Sage ERP Accpac Roadmap

May 2011

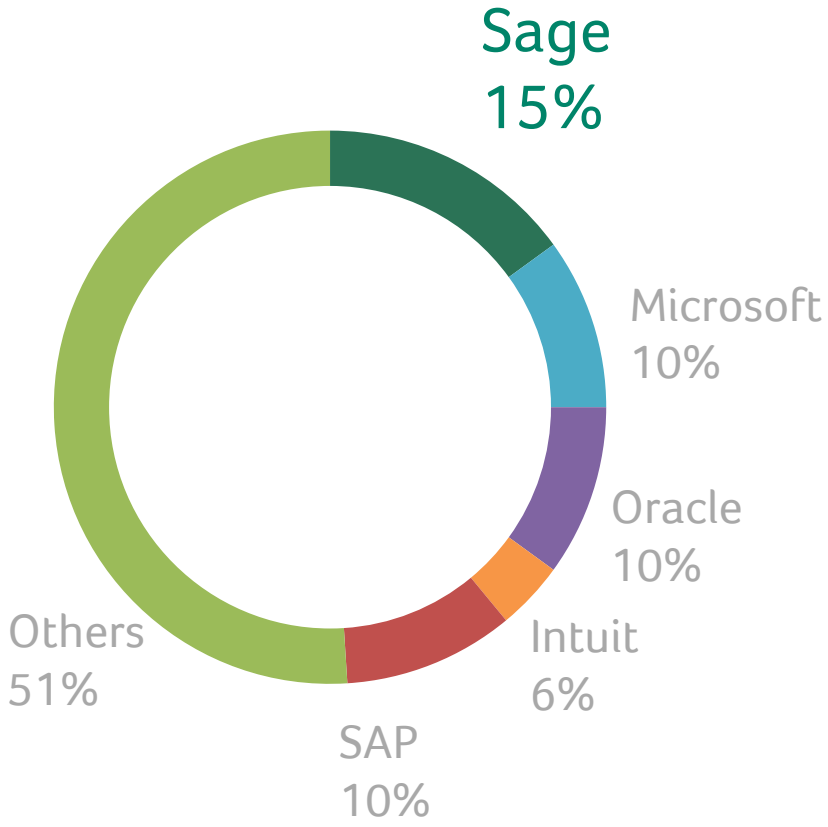
This roadmap is intended for use as a guideline and for information purposes only, and represents Sage's current view of its product direction.

*The information is **subject to change** at any time without notice.*

As Sage develops products using an Agile development methodology, any one of the milestones, features, release periods or versions could change. None of the information should be interpreted as a commitment on the part of Sage.

Sage is #1 Worldwide*

- A global publicly traded company
- Over 13,000 employees
- Over 6 million customers
- Over 25 years of experience



Source: *IDC #220937, Worldwide ERP 2008 Vendor Analysis, published December 2009. Based on ERP revenue small business; <1000 employees

Sage Overview

Market	Finances	Customers
Global company with over 13,400 employees	Revenue of $2.24B for FY2010	Provide advice to customers through 1.7 million support contracts
6.3 million customers worldwide	Market capitalization of approximately $4.3 billion	Manage around 40,000 customer calls each day
One of the market leaders in the UK, North America, Europe, South Africa and Asia	Made over 40 acquisitions since 1991	Work with over 27,000 reseller partners and over 40,000 accountants worldwide

Sage ERP Accpac

Serving over **45,000** customers

- Sage global strategic product
- Fully integrated business management solution
- Superior architecture that grows with your business
- Global reach, local touch
- Collaborative ecosystem
- Deployment options for on-premise or on-demand (cloud)

Sage ERP Accpac Product Roadmap

Version 6.0
Q4 2010
- Portal
- Snapshots
- Inquiry
- SageCRM workflow
- Fiscal period locking

Sage ERP Accpac Online
Q2 2011
- Intelligence available
- Disaster Recovery expanded

Version 6.1
Q4 2011
- Web Client for Financial and Operational modules
- Improved usability
- Mobile support
- Expanded virtual platforms

Version 6.2
2012
- Approval workflows
- Payroll web
- User Management
- Customizer
- Sage Advisor

2011 2012

Intelligence Designer
Q2 2011
- Report Design Wizard
- What-if Scenario Analysis

Product Update
Q2 2011
- Bank Rec individual receipt

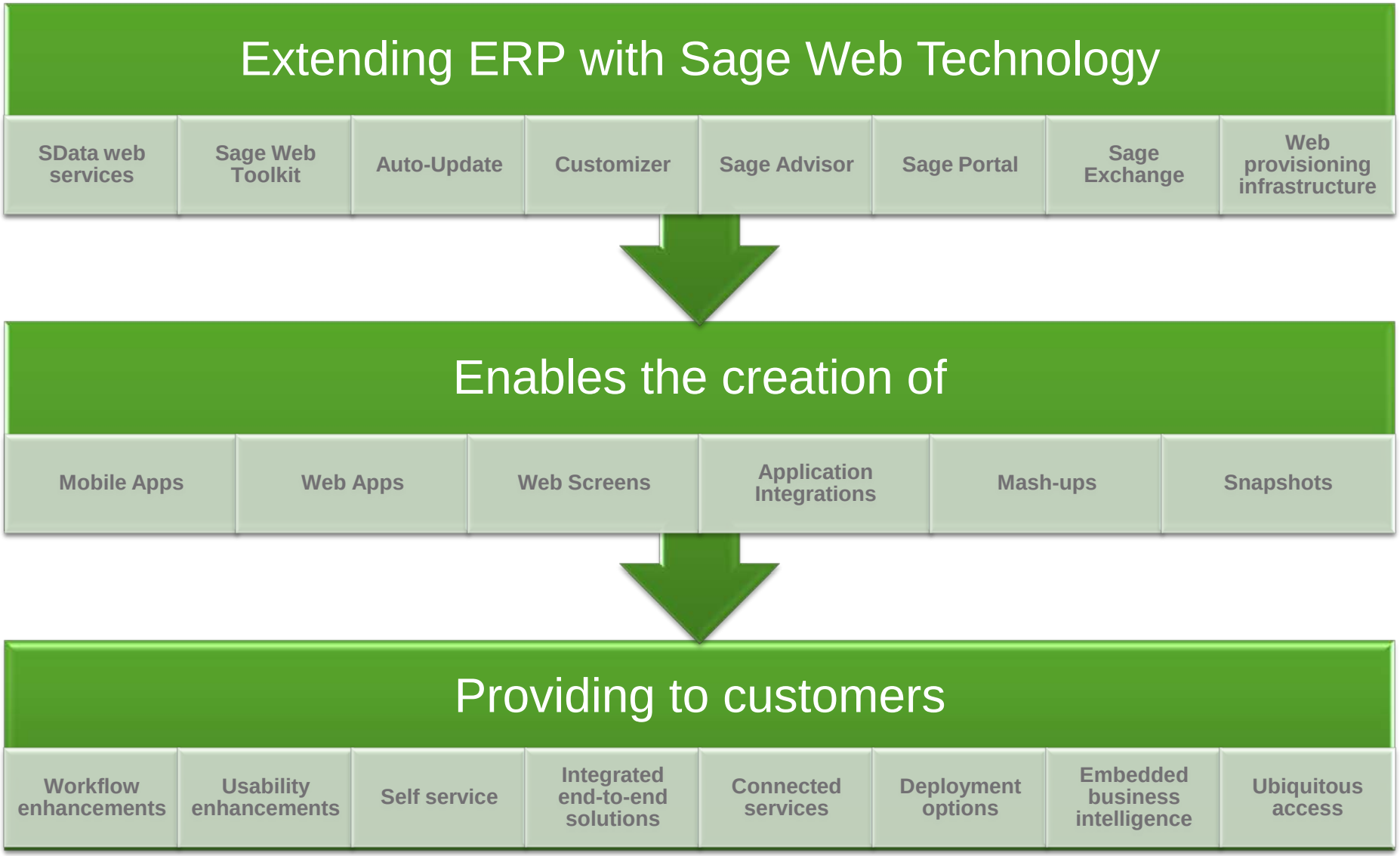
Payment Processing
Q2 2011
- Credit Card Processing
- Integrated to AR and OE

MS SQL Server
Q2 2011
- Competitive Upgrade pricing

Sage Sales Tax
Q3 2011

SageCRM v7.1
Q3 2011
- eMarketing
- iPhone App
- Twitter integration
- Total campaign management
- MS Exchange integration
- Interactive dashboard

Sage ERP Technology Stack



Sage ERP

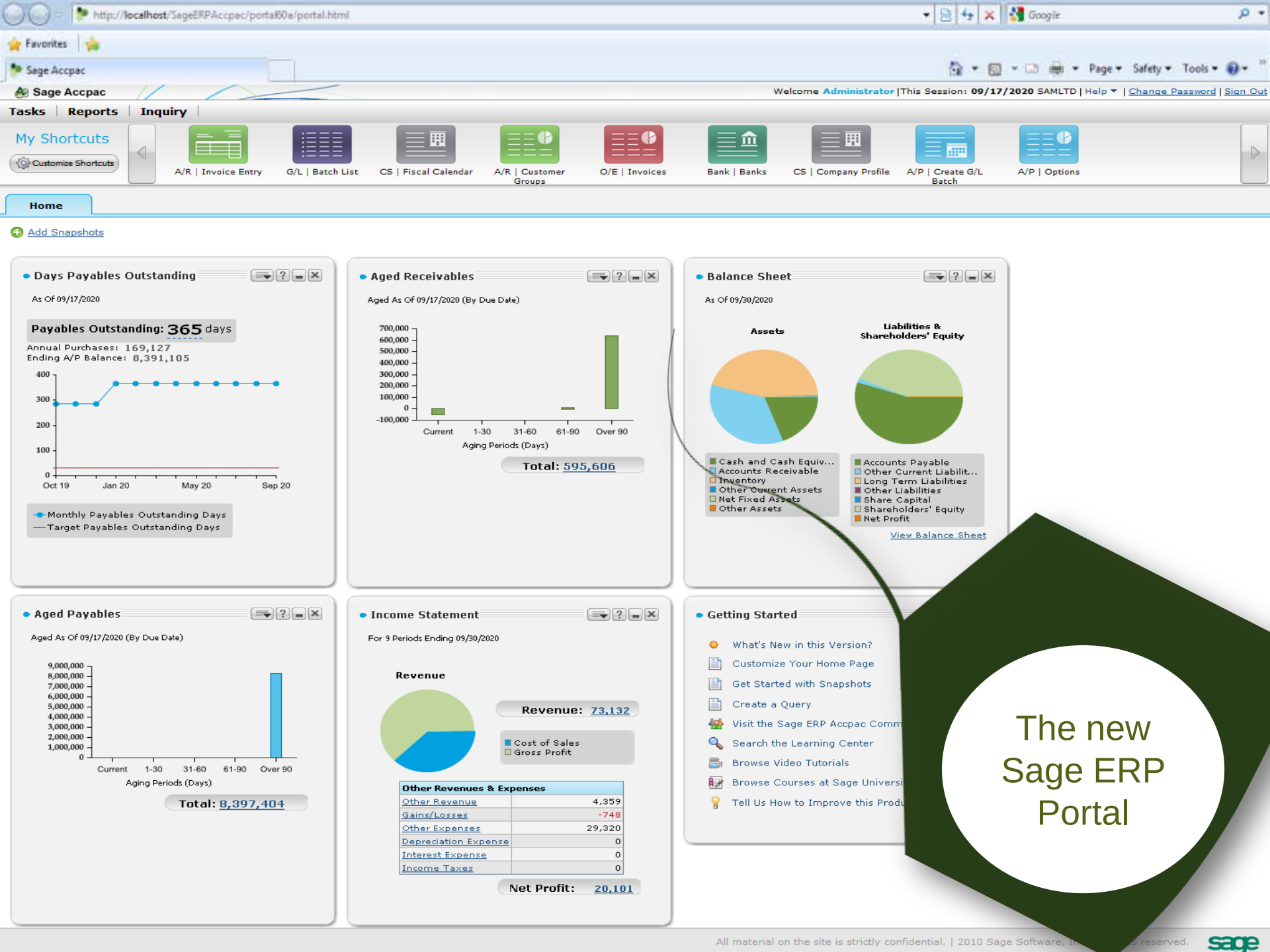
Sage ERP Accpac Version 6.0

Now Available!

sage

Now Available: Sage ERP Accpac 6.0

- Increase Productivity
  - Role based, personalized Portal
  - Task oriented navigation
  - Manage fiscal periods by module
- Envision Success
  - Enhance visibility into metrics with Snapshots
  - Quick information lists through ad-hoc Inquiry
- Accelerate Growth
  - Enhanced quote-to-order workflow for SageCRM users
  - Improved usability


http://localhost/SageERPAccpac/portal60a/portal.html
Favorites
Sage Accpac
Sage Accpac
Welcome Administrator | This Session: 09/17/2020 SAMLTD | Help | Change Password | Sign Out
Tasks | Reports | Inquiry
My Shortcuts
Customize Shortcuts
A/R | Invoice Entry
G/L | Batch List
CS | Fiscal Calendar
A/R | Customer Groups
O/E | Invoices
Bank | Banks
CS | Company Profile
A/P | Create G/L Batch
A/P | Options
Home
Add Snapshots
Days Payables Outstanding
As Of 09/17/2020
Payables Outstanding: 365 days
Annual Purchases: 169,127
Ending A/P Balance: 8,391,105
400
300
200
100
0
Oct 19
Jan 20
May 20
Sep 20
Monthly Payables Outstanding Days
Target Payables Outstanding Days
Aged Receivables
Aged As Of 09/17/2020 (By Due Date)
700,000
600,000
500,000
400,000
300,000
200,000
100,000
0
-100,000
Current
1-30
31-60
61-90
Over 90
Aging Periods (Days)
Total: 595,606
Balance Sheet
As Of 09/30/2020
Assets
Liabilities & Shareholders' Equity
Cash and Cash Equiv...
Accounts Receivable
Inventory
Other Current Assets
Net Fixed Assets
Other Assets
Accounts Payable
Other Current Liabilit...
Long Term Liabilities
Other Liabilities
Share Capital
Shareholders' Equity
Net Profit
View Balance Sheet
Aged Payables
Aged As Of 09/17/2020 (By Due Date)
9,000,000
8,000,000
7,000,000
6,000,000
5,000,000
4,000,000
3,000,000
2,000,000
1,000,000
0
Current
1-30
31-60
61-90
Over 90
Aging Periods (Days)
Total: 8,397,404
Income Statement
For 9 Periods Ending 09/30/2020
Revenue
Revenue: 73,132
Cost of Sales
Gross Profit
Other Revenues & Expenses
Other Revenue 4,359
Gains/Losses -748
Other Expenses 29,320
Depreciation Expense 0
Interest Expense 0
Income Taxes 0
Net Profit: 20,101
Getting Started
What's New in this Version?
Customize Your Home Page
Get Started with Snapshots
Create a Query
Visit the Sage ERP Accpac Comm
Search the Learning Center
Browse Video Tutorials
Browse Courses at Sage Universi
Tell Us How to Improve this Produ
The new Sage ERP Portal
All material on the site is strictly confidential. | 2010 Sage Software,
reserved.
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Learn more about Version 6.0 at
www.sageerpaccpac6.com

Sage University

Free anytime learning course
www.sageu.com/accpac

YouTube

5 minute overview video
www.youtube.com/watch?v=HYUErIxYiPg

The Sage ERP Learning Channel
www.youtube.com/user/SageUERPLearning

Interactive Documentation
www.youtube.com/user/SageAccpacDoc

Version 6.0 - Product Update 1

- Bank Services – Improve Productivity
  - Faster deposit reconciling, as you can now clear individual receipts within a deposit
  - On both the Deposit Register and the Reconciliation Status report, you can now filter deposits with a status of Reconcile by Deposit Detail

Feedback from
www.sageaccpac.com/feedback

Version 6.0 - Product Update 1

- Accounts Receivable
  - You can now see and edit the Deposit Date on the Receipt Entry form
- Order Entry
  - Get the ability to return serialized and lot items to a location other than the location from which the items were shipped
- Project and Job Costing
  - Create a new invoice batch in Accounts Receivable when you post a billing worksheet, even if there is an unposted job-related batch in Accounts Receivable

Sage SmartBusinessReports

A Sage Connected Service

- Powered by Experian offers Sage's business customers:
  - Easy to read business credit reports on their company, or on their customers
  - Business credit monitoring and alerts
- Access business credit reports at
  - http://www.smartbusinessreports.com/?link=1241

Experian

Get one **FREE credit report** at http://promo.smartbusinessreports.com/sage

Sage ERP

Microsoft SQL Server

Competitive Upgrade Pricing

sage

Microsoft SQL Server Runtime Edition

- Microsoft SQL Server available from Sage
  - Offers same functionality and performance as Microsoft SQL Server 2008 R2 Standard edition
  - Can be used with Sage products and integrated solutions
  - No restrictions on users or database size
- Licensing
  - Client Access License (CAL) per user - $175
  - CAL Competitive Upgrade per user - $75 – ***NEW***
    - Available for upgrades from Pervasive to MS SQL Server
    - Available for upgrades from Quickbooks, Simply, Peachtree and other competitive products using non-Microsoft databases
  - Per Processor License for unlimited usage - $5,000

Sage ERP

Sage ERP Accpac Intelligence

Now Available!

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Sage ERP Accpac Intelligence

- Complex reporting made easy
  - Business Intelligence in a familiar Microsoft Excel interface
  - Easily customizable “out of the box” financial, sales, purchasing, and inventory report templates and dashboards
- Transform your data into information
  - Powerful multi-dimensional analysis
  - Perform what-if scenarios that go beyond just transactional data
- Consolidate data from multiple companies and multiple sources

Free
Report Manager
included with Sage ERP Accpac

DASHBOARD - SAMPLE COMPANY INC.

Period: January 2011 to August 2011

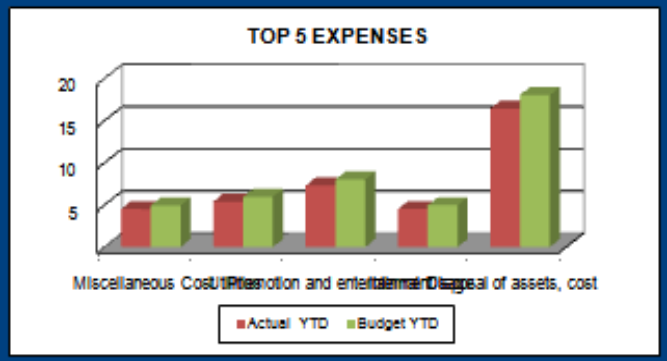
Profit & Loss	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Sales	25,097	(22,000)	47,097	63,597	(22,000)	85,597
Cost of Sales	5,505	5,200	(305)	5,505	5,200	(305)
Gross Profit	**19,593**	**(27,200)**	**46,793**	**58,093**	**(27,200)**	**85,293**
Expenses	-	-	-	-	-	-
Net Income before tax	**19,593**	**(27,200)**	**46,793**	**58,093**	**(27,200)**	**85,293**

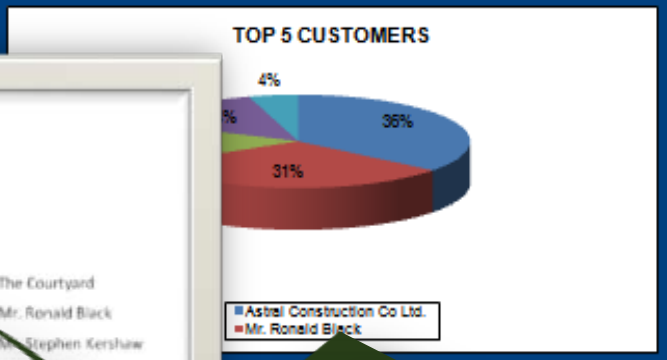
Top 5 Expenses	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Miscellaneous Cost	1,500	1,650	150	4,500	4,950	450
Utilities	1,800	1,980	180	5,400	5,940	540
Promotion and entertainment	2,430	2,673	243	7,290	8,019	729
Internal Usage	1,503	1,653	150	4,509	4,960	451
Disposal of assets, cost	5,468	6,015	547	16,404	18,044	1,640
	12,7					

Top 5 Customers	YTD
Astral Construction Co Ltd.	6,9
Mr. Ronald Black	5,9
J & Y Builders Ltd.	2,8
ACME Plumbing	2,6
The Courtyard	9
	19,3

Top 5 Items	YTD
Fluorescent Desk Lamp	5,9
Computer mouse	5,2
CPU	3,0
Computer Keyboard	2,5
Tower Case	1,9

Bottom 5 Item
13W Mini Fluores
Bulletin Board
Desk Calendar P
Halogen Desk Lig





Your data pulled directly into **Excel**

Sage ERP Accpac Intelligence Designer

Available Now!

- Simplified “drag and drop” custom report creation
- Wizard to quickly create new customized layouts with multilevel groupings
- Column and page level groupings by any field
- Instant “what-if” scenario analysis

Learn more at
http://www.sageaccpac.com/lp/sai/solutions

Sage University

Free anytime learning course
www.sageu.com/accpac

YouTube

The Sage ERP Learning Channel
www.youtube.com/user/SageUERPLearning

Sage ERP

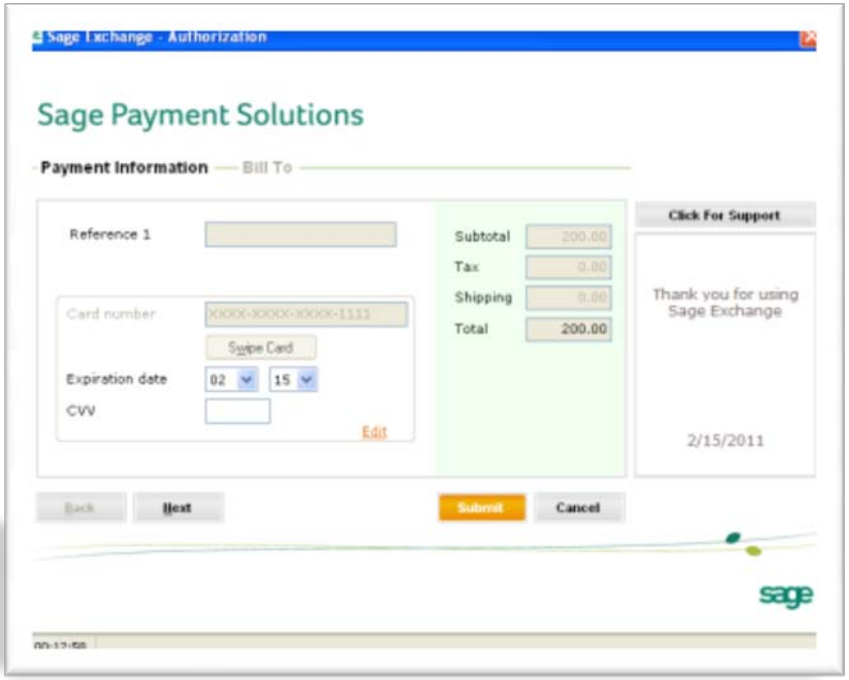
Sage ERP Accpac Payment Processing

Available May 2011

sage

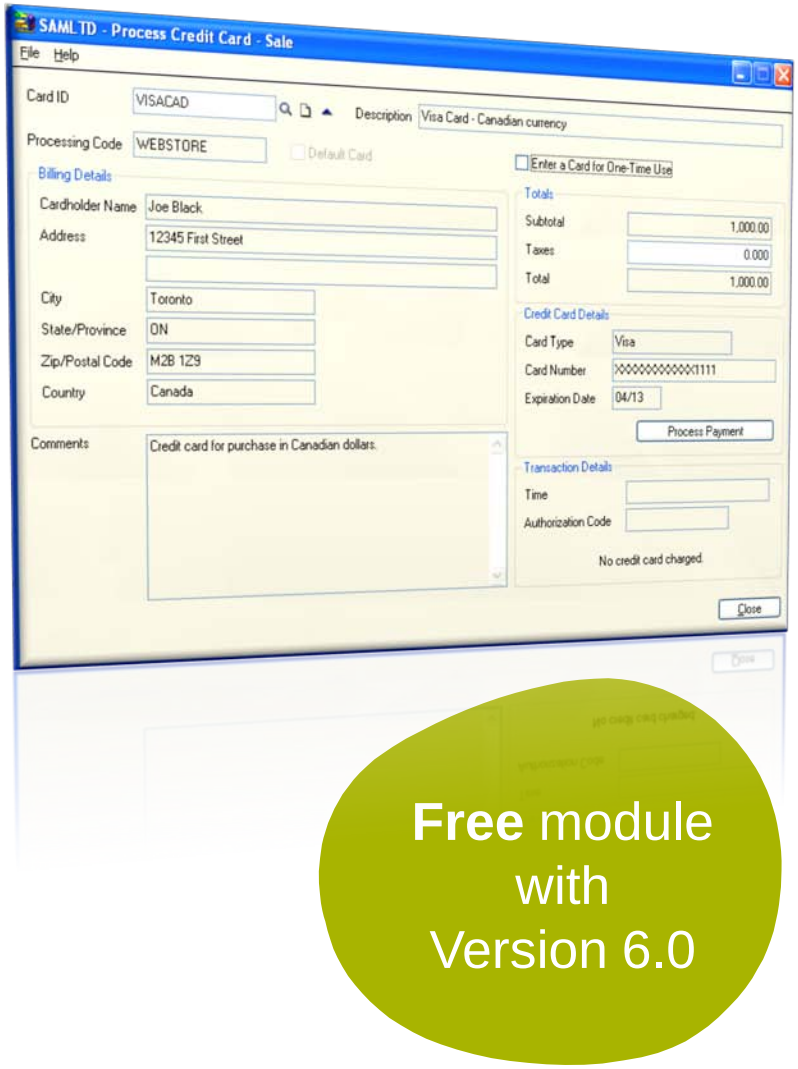
Sage ERP Accpac Payment Processing

- Eliminates manual data entry and reduces the risk of errors
- Uses the power of Sage Exchange to drive payment transactions into Sage ERP Accpac
- Reduces fraud exposure and PCI compliance costs
- Improves cash flow management and forecasting
- Provides a consolidated view of payment activity



PCI Security Standards Council

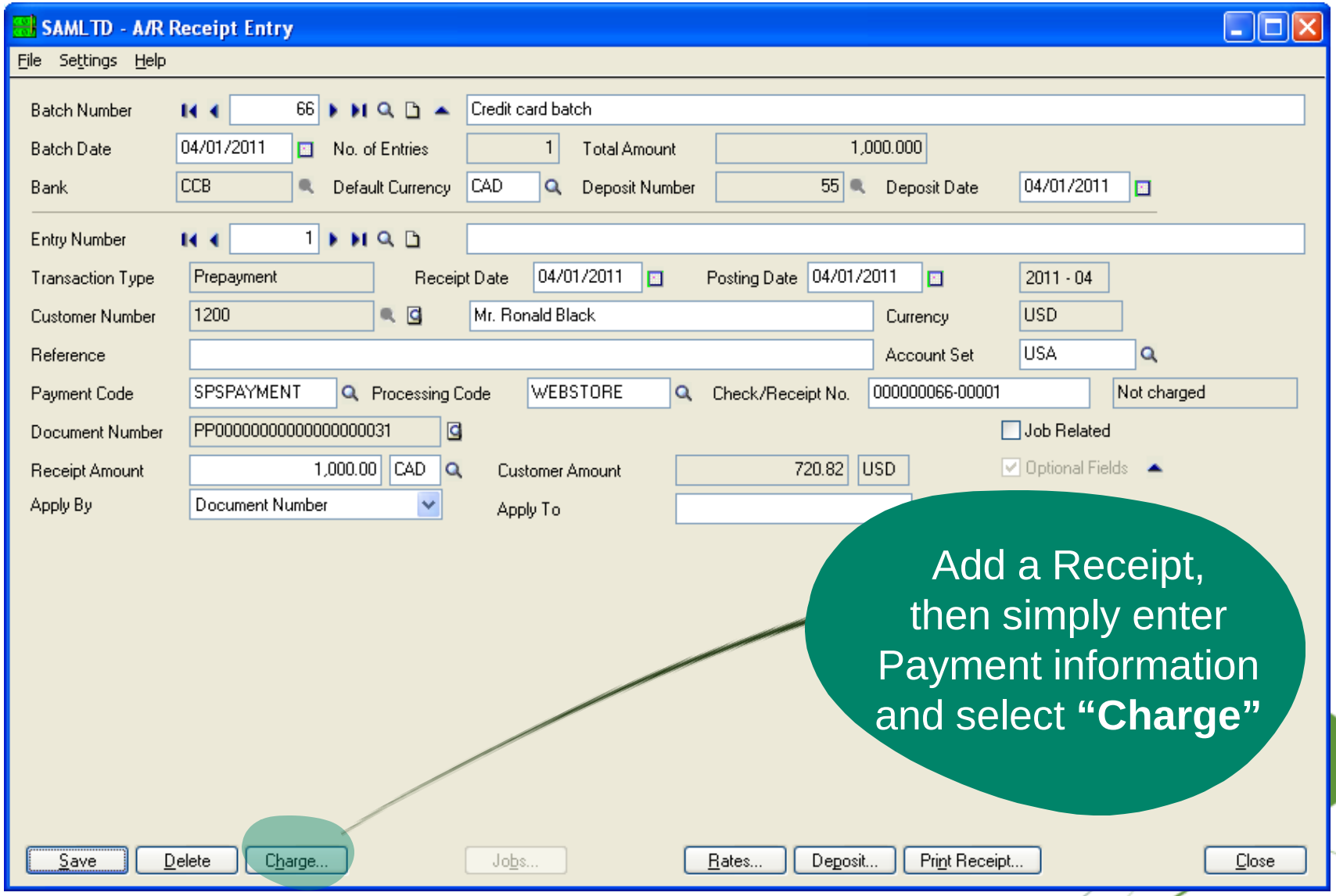
Powerful Payment Functionality



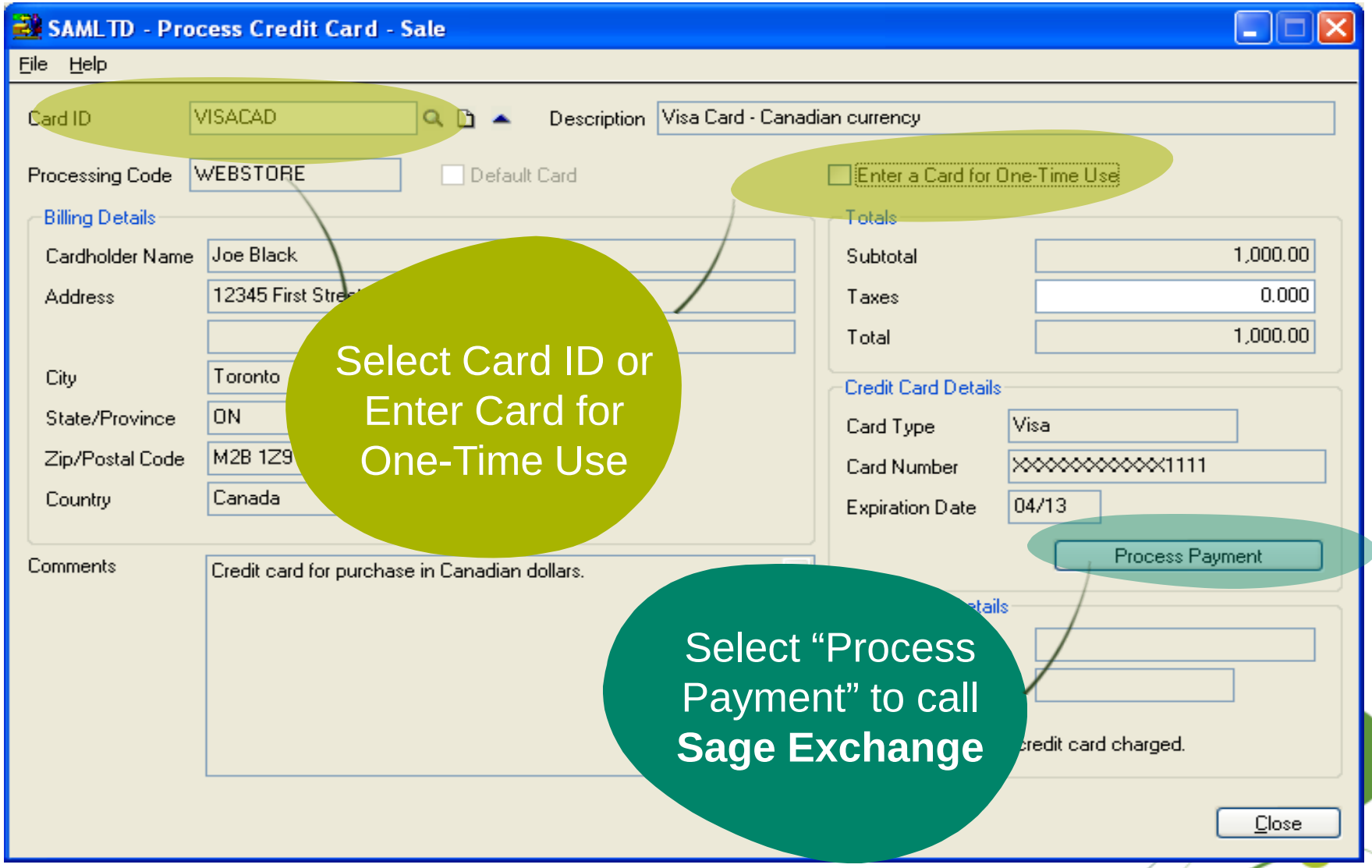
Free module with Version 6.0

- Take credit cards as payments on open invoices or as deposits on sales orders
- Swipe credit cards when the credit card is present
- Refund credit card transactions back to original credit card
- Perform reconciliation of credit card transactions between the processor and the company
- Store multiple cards per company and identify the default card to use

Workflow Example – AR Receipt Payment

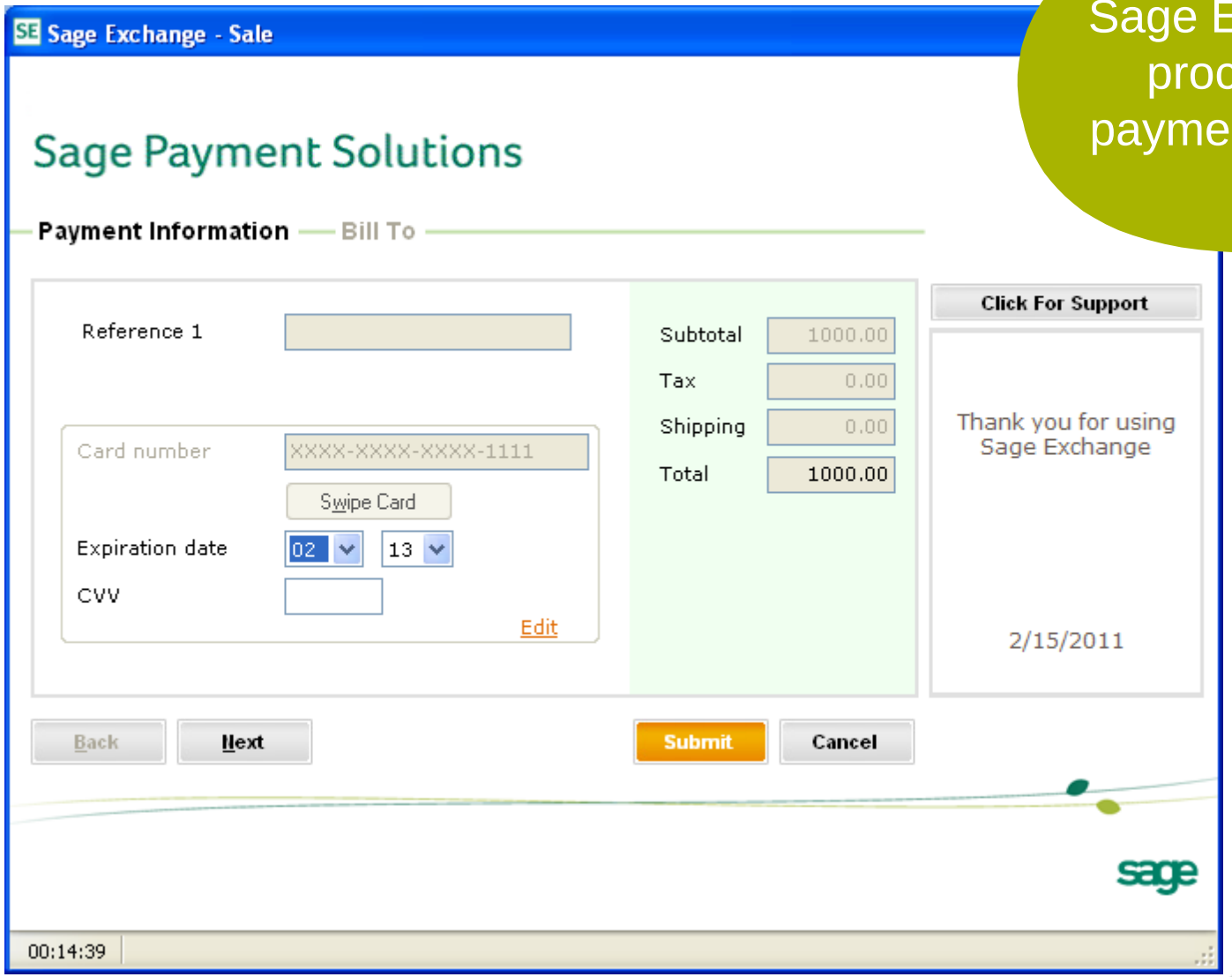


Process Credit Card – Sale Form

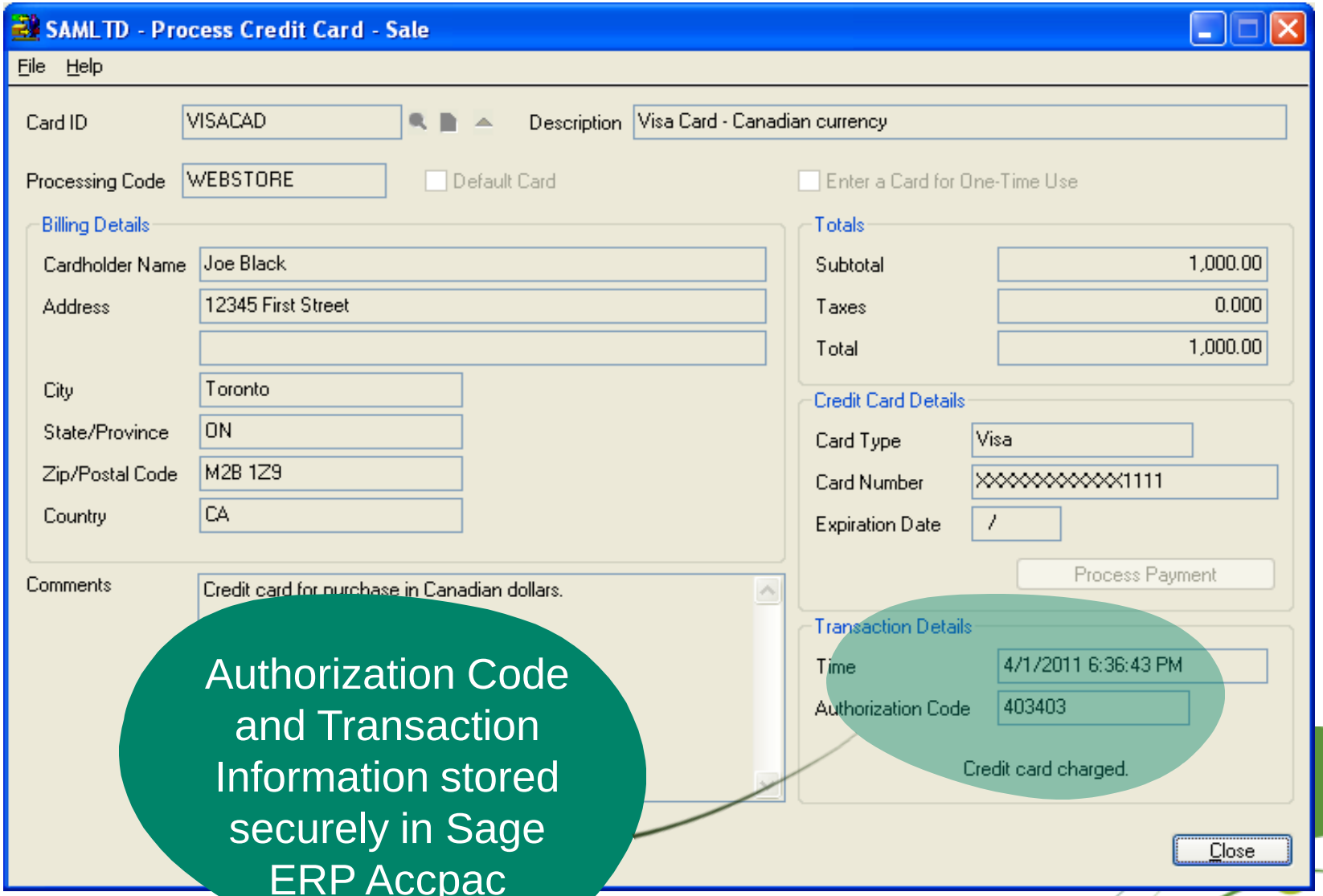


Process Credit Card – Sale

Sage Exchange processes payment details



Process Credit Card – Sale Completed



Get Your Sage Merchant Account Now!

- Engage a Sage Connected Services Specialist
  - Call 1-877-541-1681 ext. 340123, or
  - Email your contact information to AccpacConnectedServices@sage.com
- Call your Sage Business Partner to order the Module
  - Free module for customers on a Sage business care plan
  - Available for Version 6.0 now, for Version 5.6 in July 2011
  - Requires Product Update 1 for Version 6.0 or Product Update 3 for Version 5.6

Free Payment Processing module

Learn more at

http://www.sageaccpac.com/paymentprocessing

Sage University

Free anytime learning course
www.sageu.com/accpac

PCI Compliance Information
http://www.sageaccpacinfo.com/PCI/

Sage Exchange - Integrated Payment Solutions
http://www.sagepayments.com/Sage-Services/Sage-Exchange.aspx

The Sage ERP Learning Channel
www.youtube.com/user/SageUERPLearning

Sage ERP

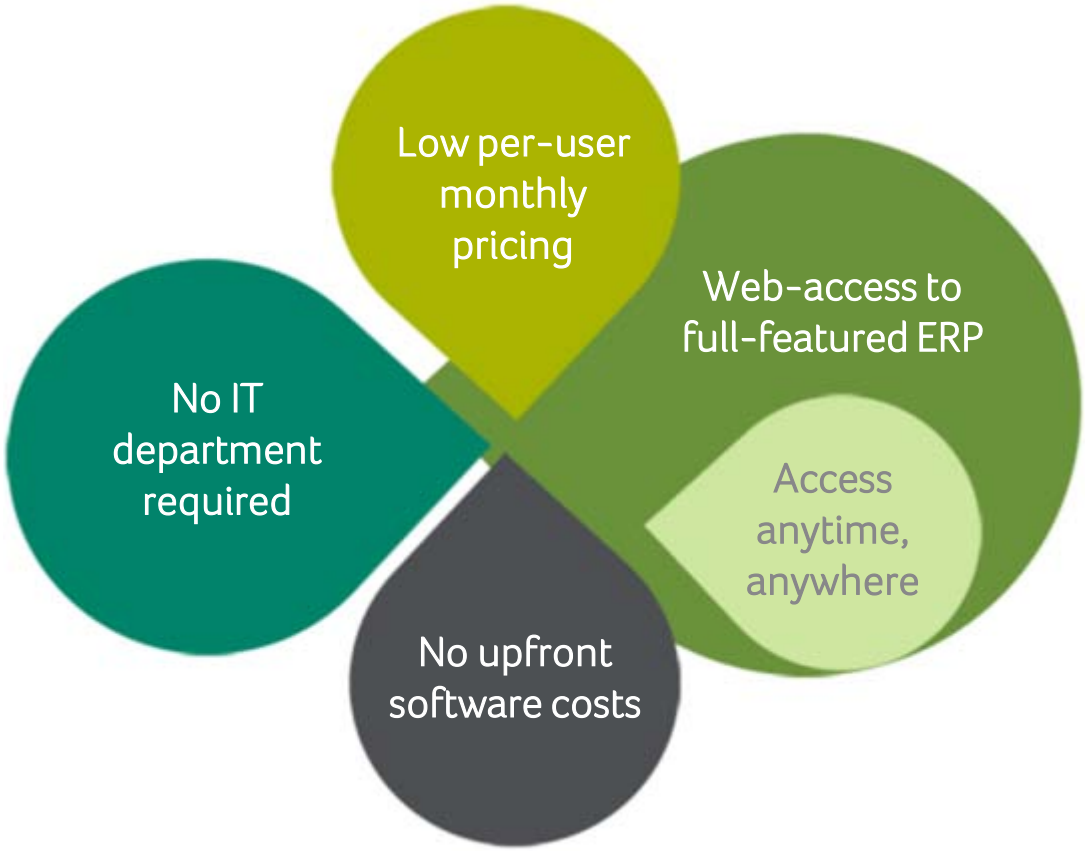
Sage ERP Accpac Online

Cloud Deployment Option

sage

Sage ERP Accpac Online

- Cloud deployment hosted by Sage
- Deployment option for customers with
  - Short implementation timeframe
  - Limited IT staff or budget
- Seamless migration to on-premise when your business grows

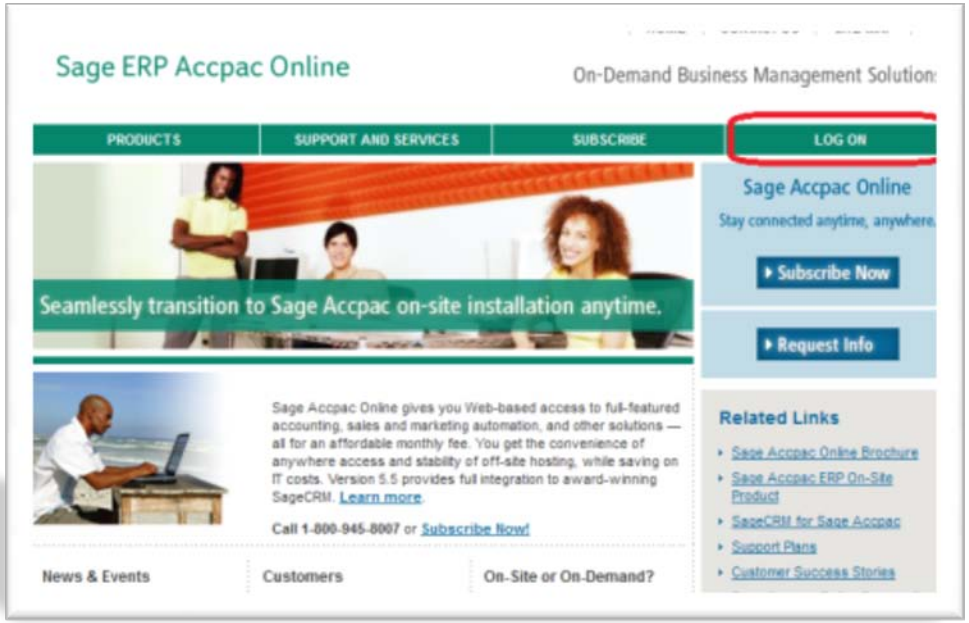


Learn more at

www.sageaccpaconline.com

Sage ERP Accpac Online – What's New

- Sage Accpac Intelligence now available
- Enhanced fully automated Disaster Recovery Plan
  - Recovery Time: < 6 hours
  - Near real-time data replication
  - Fully redundant environment



Hosting Infrastructure

- 99.874% recorded uptime for 2010
- Hosting facilities operated by QTS Atlanta Metro Data Center
  - 2nd Largest Data Center in the world
  - 990,000 square feet in total enclosed space
  - On-site Georgia Power substation and direct fiber access
- SAS-70 Type II compliant

Learn more at
http://www.qualitytech.com/facilities/atlanta-ga.jsp

Sage ERP

Sales Tax for Sage

A New Connected Service

sage

Sage Sales Tax, powered by AvaTax

- Makes paying sales tax simple for any business.
- Automatically performs address validation, sales tax jurisdiction research, and rate calculation
  - Seamlessly integrated with Sage ERP Accpac
  - Covers all sales tax jurisdictions in US and Canada
- Protect yourself from the risk of an audit
- Eliminate the need to research and maintain sales tax codes or schedules
- Set best practices in sales tax compliance
- Get back to focusing on revenue-generating activities!

A Sage Connected Service

Sage Sales Tax for Sage ERP Accpac

- Auto-Address
  - Decrease data entry time and reduce shipping rates with the best source of address data in the country
- Auto-Jurisdiction
  - Auto-Jurisdiction returns correct jurisdiction and sales tax rate for each transaction
- Statutory Requirements
  - Reduce audit risk and ensure that you are charging the correct amounts, 13,000+ jurisdictions and counting
- Reporting
  - Access all data securely online with ease
  - Consolidate data on multiple companies
- Returns
  - Automate the entire returns process and collect sales tax information from various internal and external sources

A Sage Connected Service

Learn more at
http://www.avalara.com/Sage

Overview video
http://www.avalara.com/Media/Flash/ACCPAC/WalkThroughACCPAC.swf

Sage ERP

SageCRM Version 7.1

Integrated with Sage ERP Accpac 6.0 in Q3 2011

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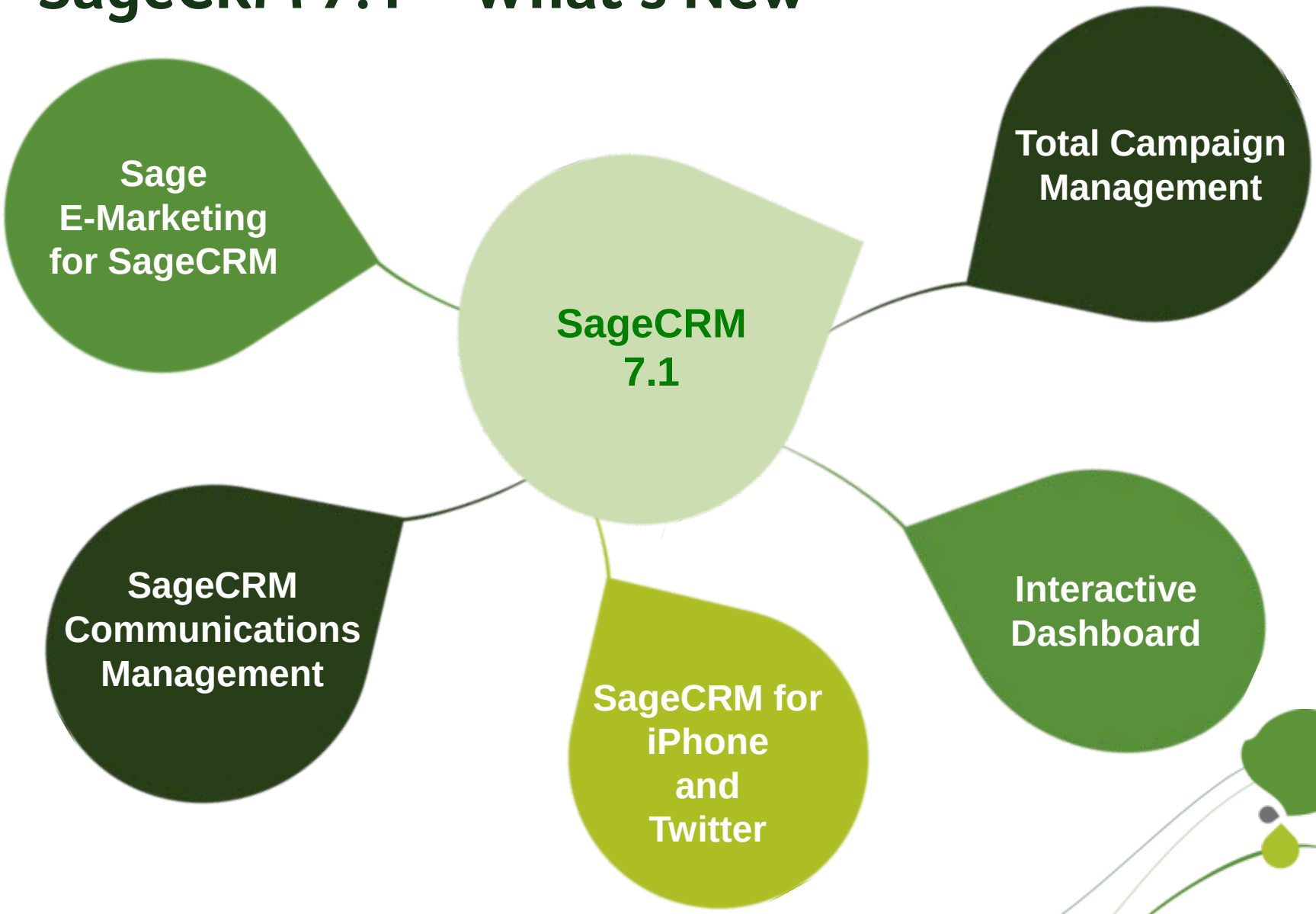
SageCRM 7.1 – What's New



Sage eMarketing for SageCRM

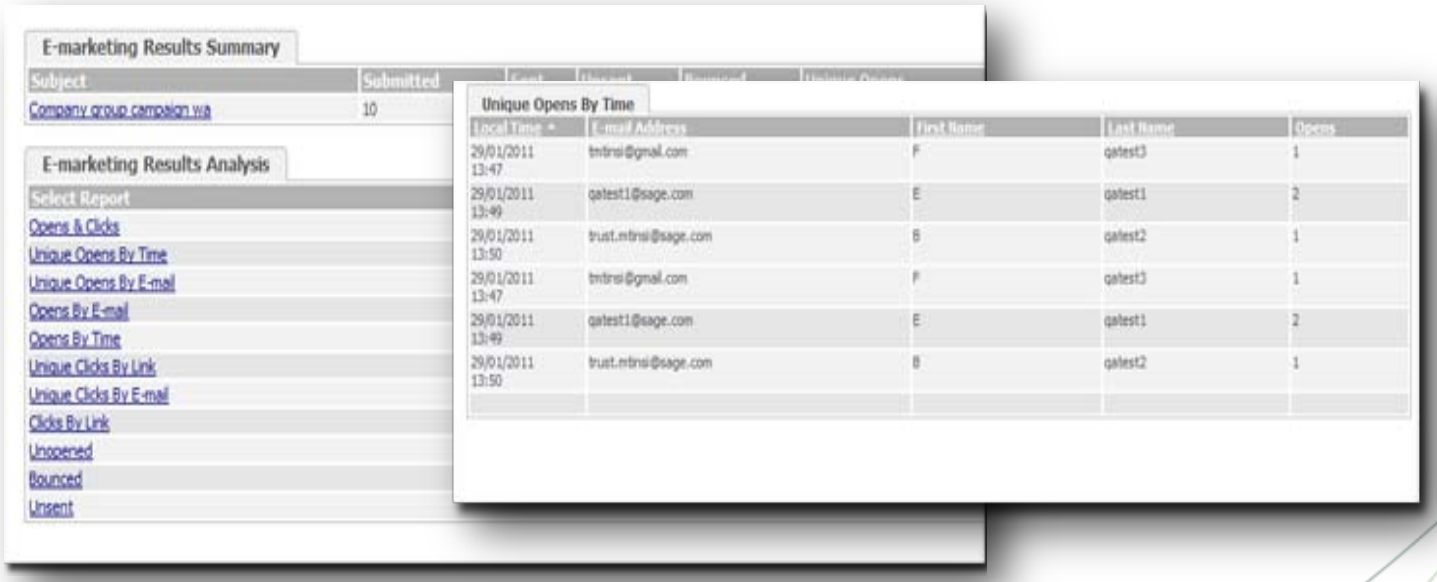
A Sage Connected Service

- Fully integrated E-marketing module to create custom, personalized e-mail marketing campaigns
  - Over 90 attention-grabbing templates out-of-the-box
  - Simple 3-step wizard for rapid execution
  - Custom landing pages for easy execution of cohesive, integrated marketing campaigns
- A Sage Connected Service
  - Low monthly subscription fee

Sage eMarketing for SageCRM

A Sage Connected Service

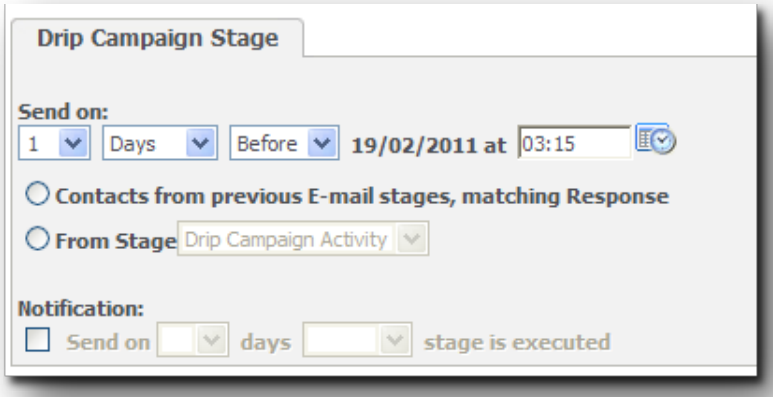
- Analyze results without ever leaving SageCRM
  - Track and monitor recipient interaction such as sent, bounced, opened and click data
  - View, filter, report and export the results
  - Create new groups within SageCRM from the results

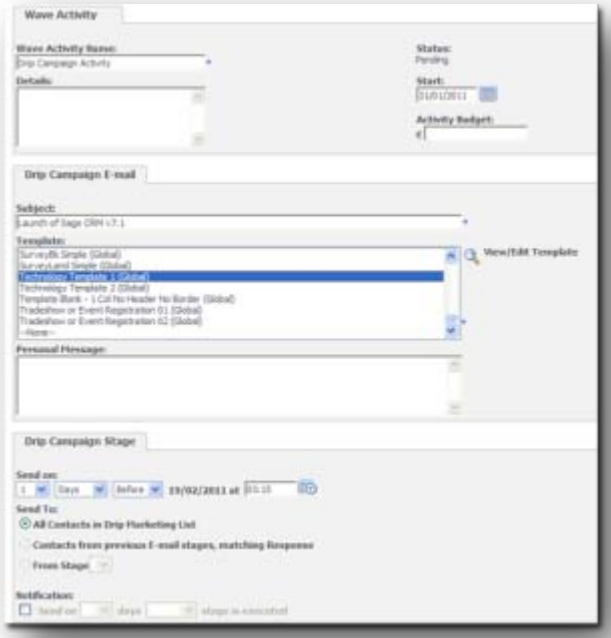


Sage eMarketing for SageCRM

A Sage Connected Service

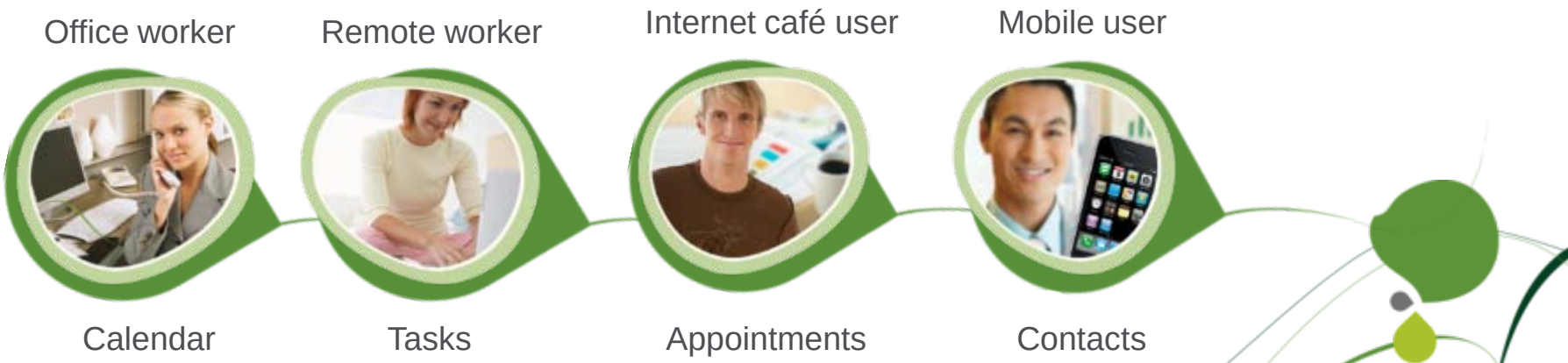
- Drip Marketing: Let SageCRM do the work!
  - Easy-to-create automated E-marketing Campaigns
  - Schedule a series of E-marketing activities based on the recipient interaction
  - Automatically create outbound call-lists based on recipients who are interested in your campaign





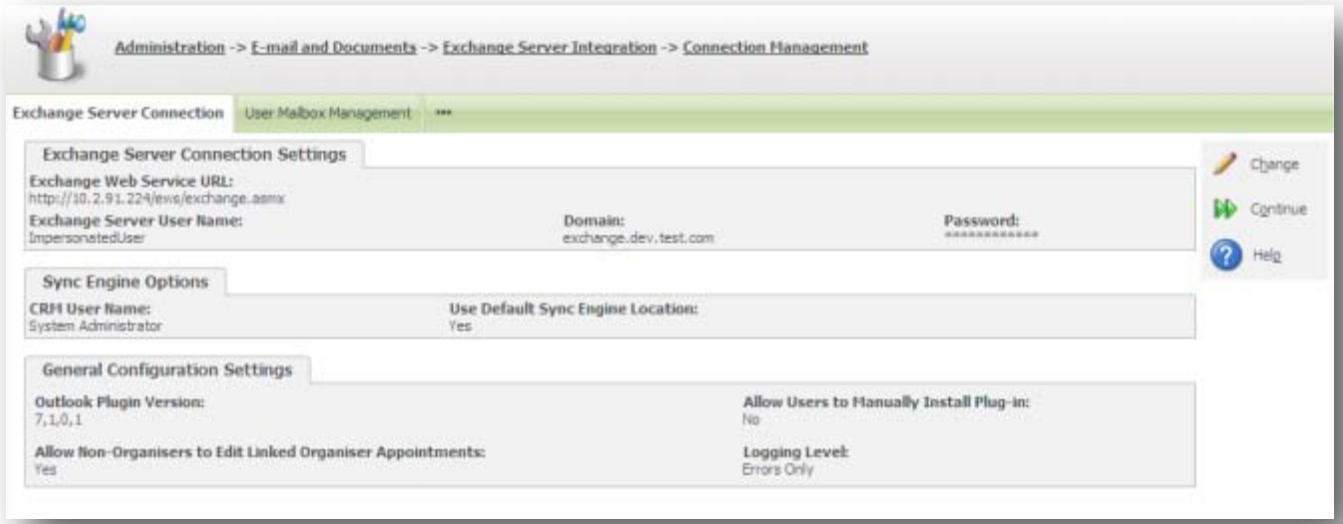
SageCRM Communications Management

- Point-and-click integration with MS Exchange for seamless calendar and communications management regardless of device or location
  - MS Exchange integration with easy point-and-click deployment
  - Server to Server Sync
- Unify all customer interactions and communication history



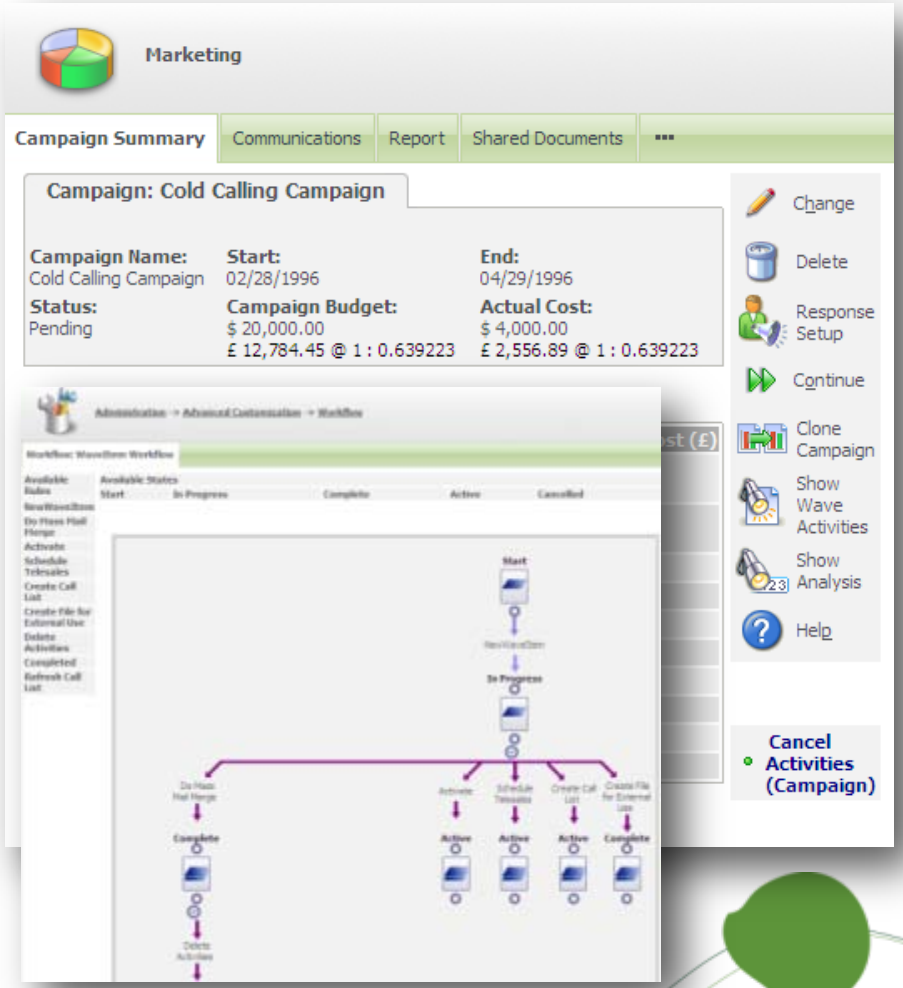
SageCRM Microsoft Exchange Server Integration

- Completely point-and-click based configuration
- Select specific mailboxes to synchronize
- Seamlessly store external attendees in customer meetings against relevant CRM contact
- File multiple e-mails against multiple targets

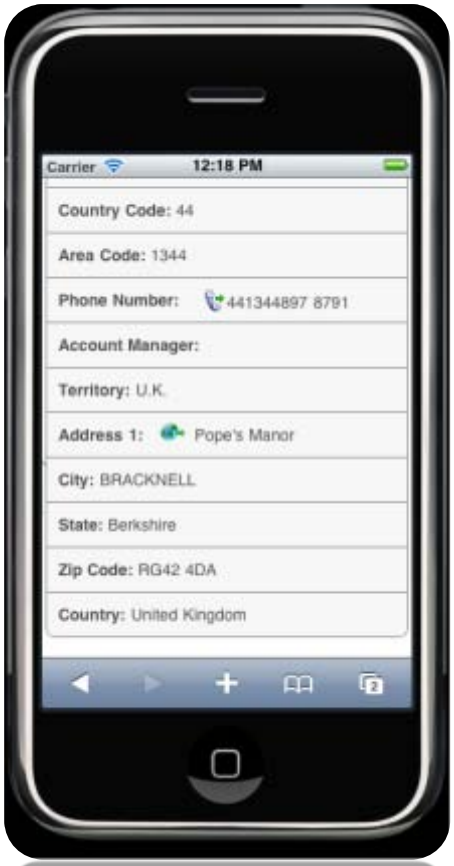


SageCRM Total Campaign Management

- Multi-channel campaign management
- Campaign cloning
- Out-of-the-box graphical marketing campaign workflow
- Budget over-run alerts
- In-call data modification

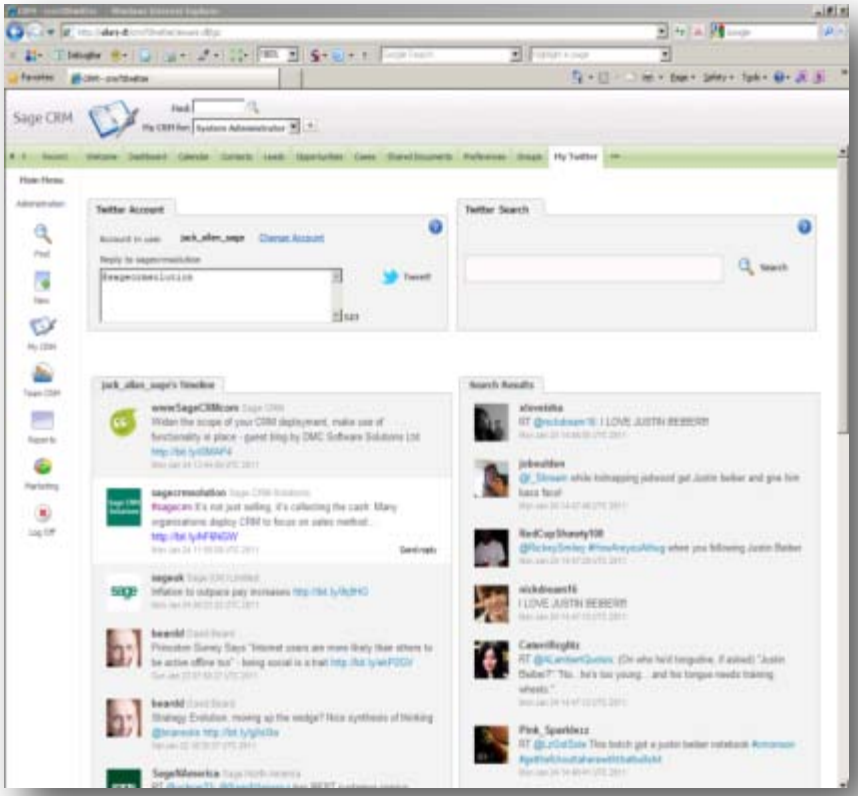


SageCRM for iPhone



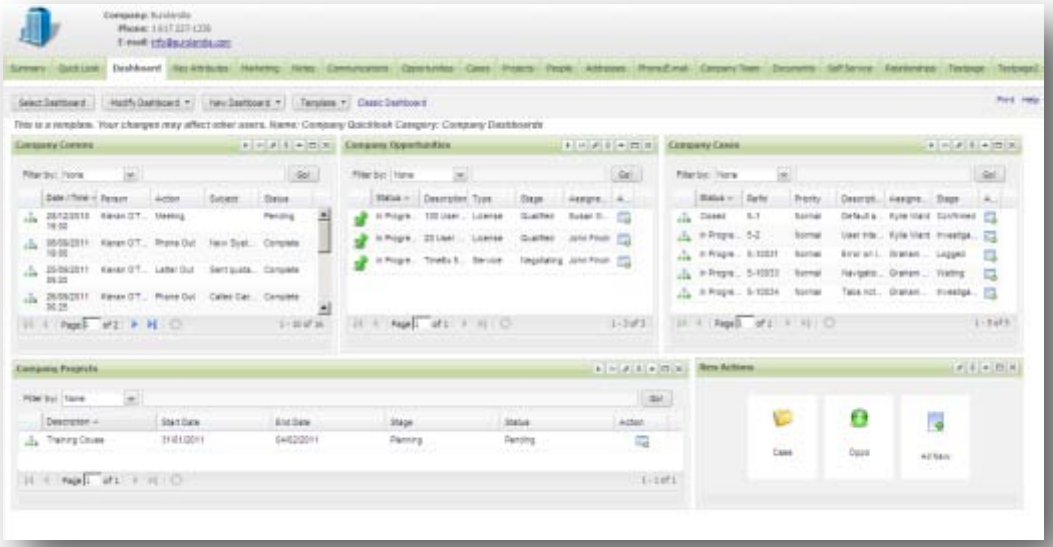
SageCRM for Twitter

- View and update Twitter
- View and post to a company's and/or person's Twitter feed
- Search for tweets about any company/person
- Save tweets against a company or person in SageCRM



SageCRM Interactive Dashboard

- Manage key accounts and working day from a single screen
- Delivers key business metrics for easy analysis
- Role-based dashboards out-of-the-box for Sales, Marketing, Customer Service and Management
- Flexible gadgets for maximum personalization



SageCRM Licensing Options

- Named and concurrent licensing available for SageCRM users
- Sage ERP Accpac user license (Lanpak) requirement eliminated for SageCRM Order Entry as of Version 6.0

Learn more at www.sageaccpac.com/sagecrm

SageCRM Community
https://community.sagecrm.com/

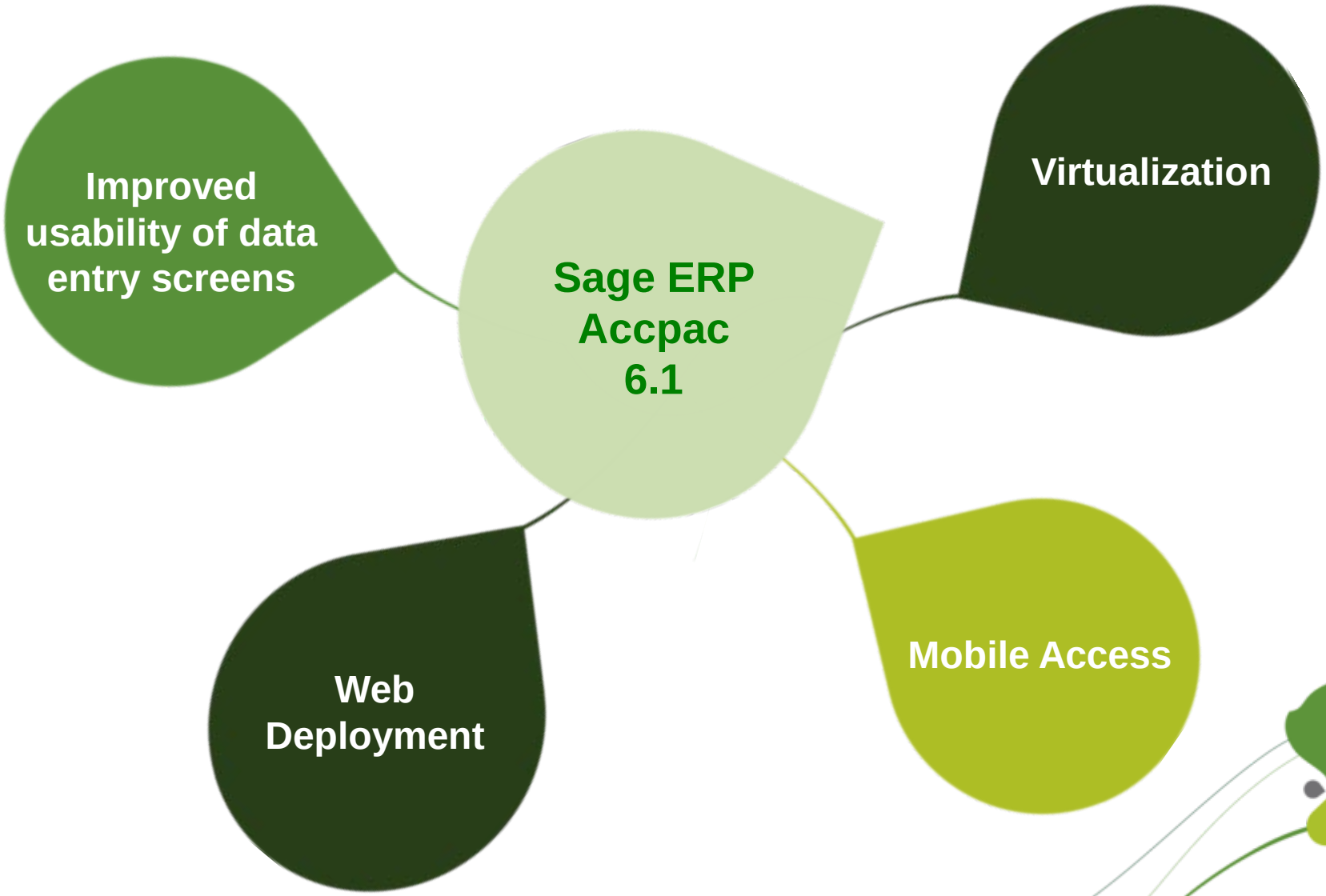
Sage ERP

Sage ERP Accpac Version 6.1

Coming Q4 2011

sage

Sage ERP Accpac 6.1 – What's New



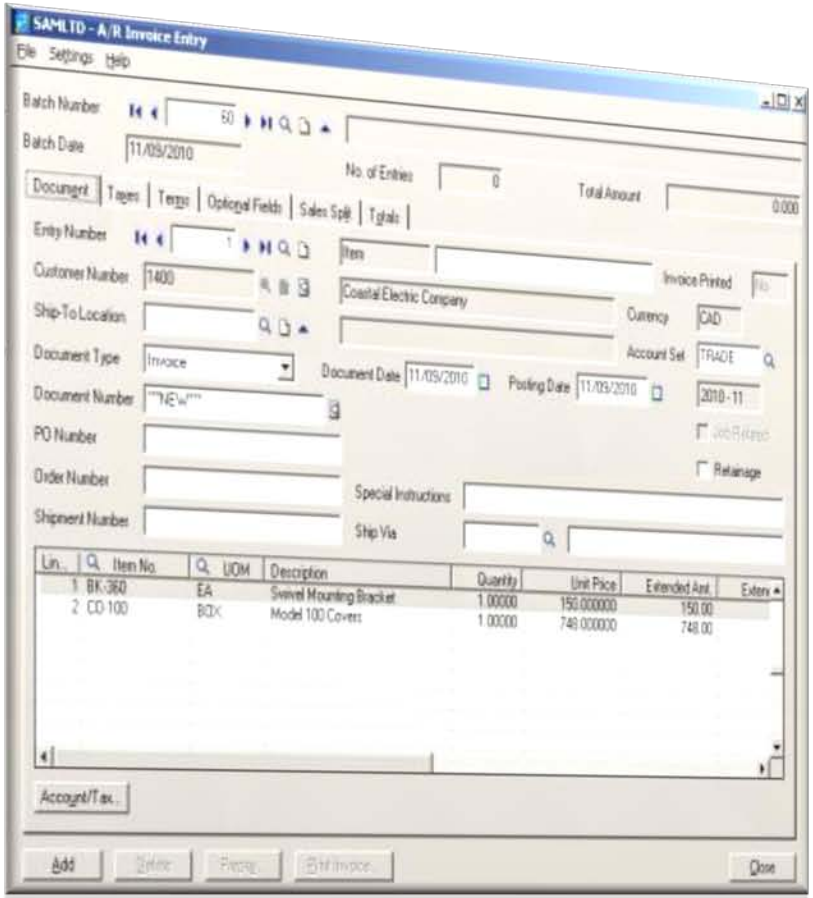
Sage ERP Accpac 6.1 – Usability

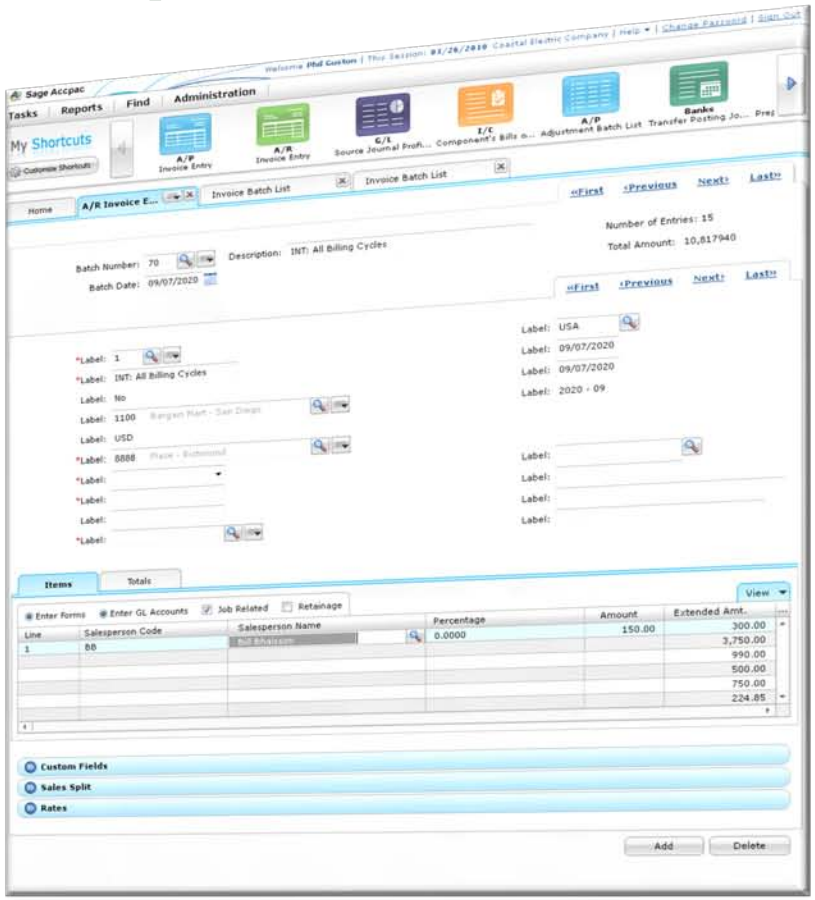
- Improved usability of data entry workflow
  - User Experience modernization
  - Consistent interactions and behavior across screens and across modules
  - Workflow enhancements
    - Personalization of screen layout
    - Intuitive and logical grouping of controls
    - Visually distinguished required fields
    - Optional fields integrated into main screen
    - Auto-suggest in Finders
    - Print multiples of the same report with different configurations

Sage ERP Accpac v6.1 – Usability

- Improved usability of data entry screens
  - Modernized web screens for core modules
    - Financial: SM/GL/AR/AP/Bank/Tax
    - Operational: OE/IC/PO
- Improved Learnability and Training
  - Contextual help
  - Interactive “how-to” videos
  - Descriptive labeling
  - Web-based help with access to PDF guides

V6.1 – Modernized User Experience

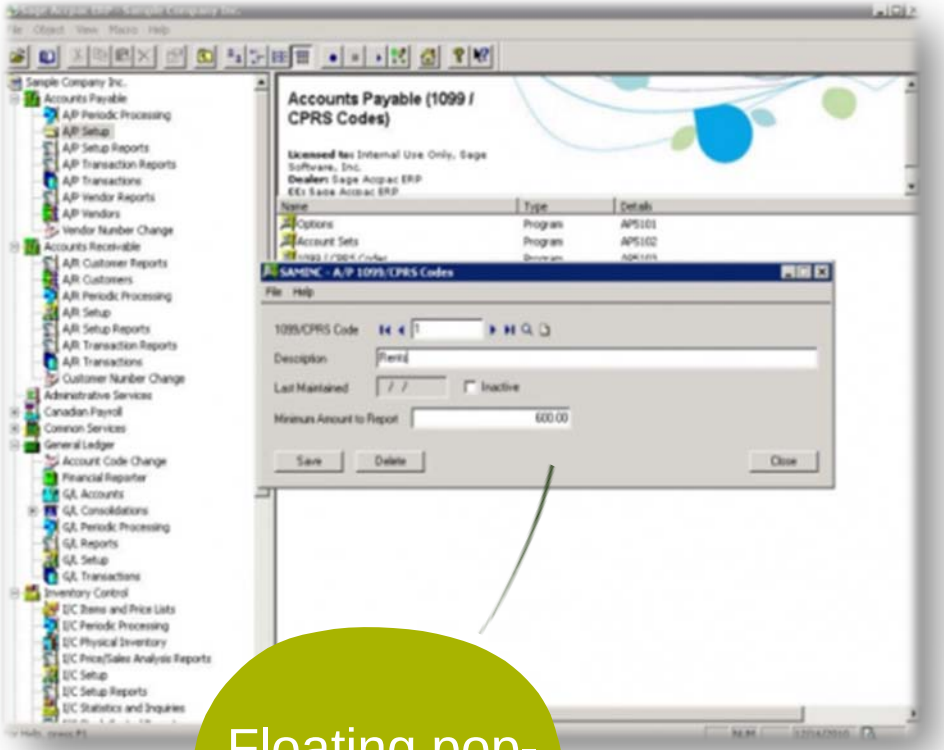




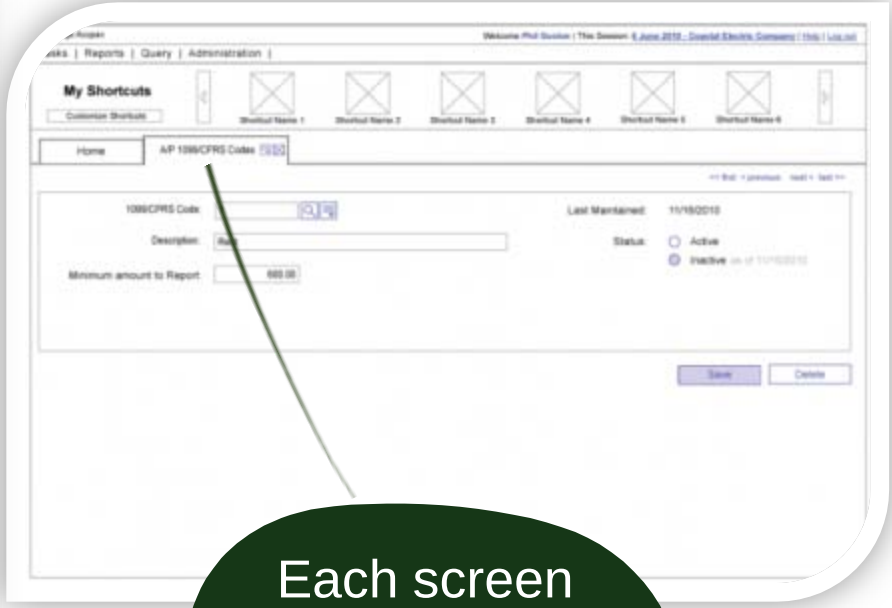
Classic

New User Experience

V6.1 – Modernized User Experience



Floating pop-up windows

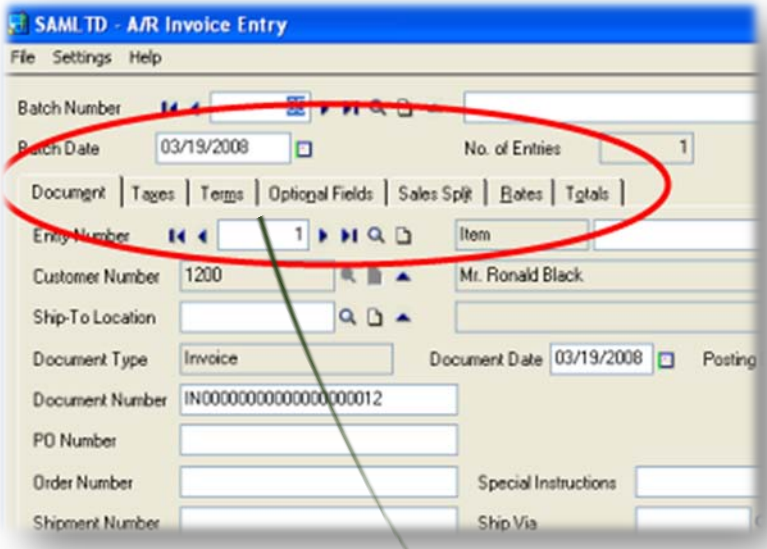


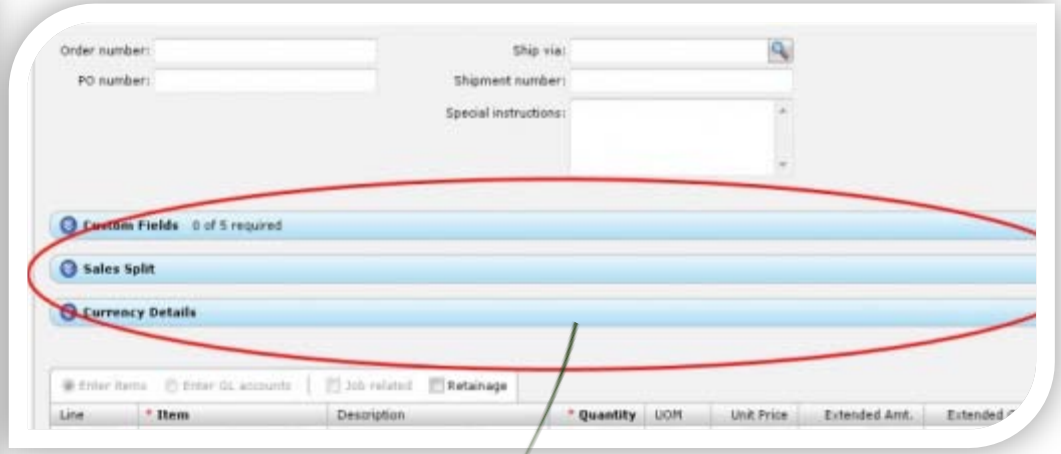
Each screen integrated into the Sage Portal as Tabs

Classic

New User Experience

Version 6.1 – Modernized User Experience





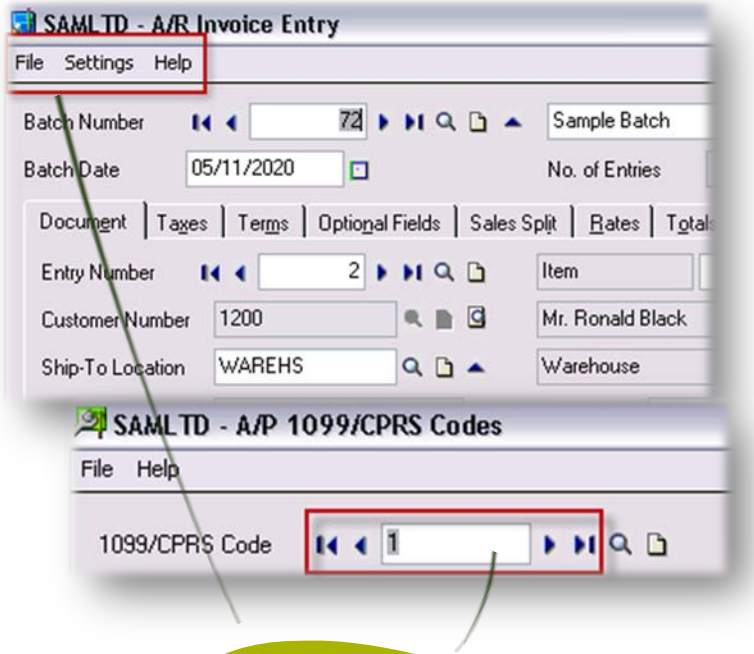
Multiple static tabs to access information

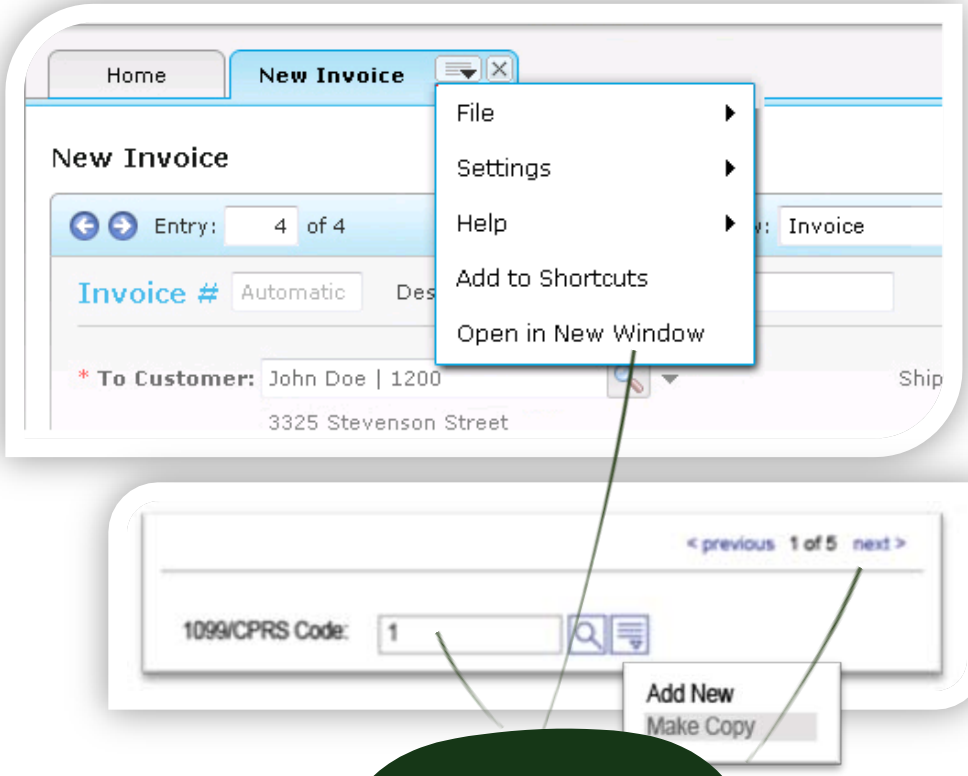
Disclosure panels on single screen that can be opened/closed to show additional information

Classic

New User Experience

Version 6.1 – Modernized User Experience





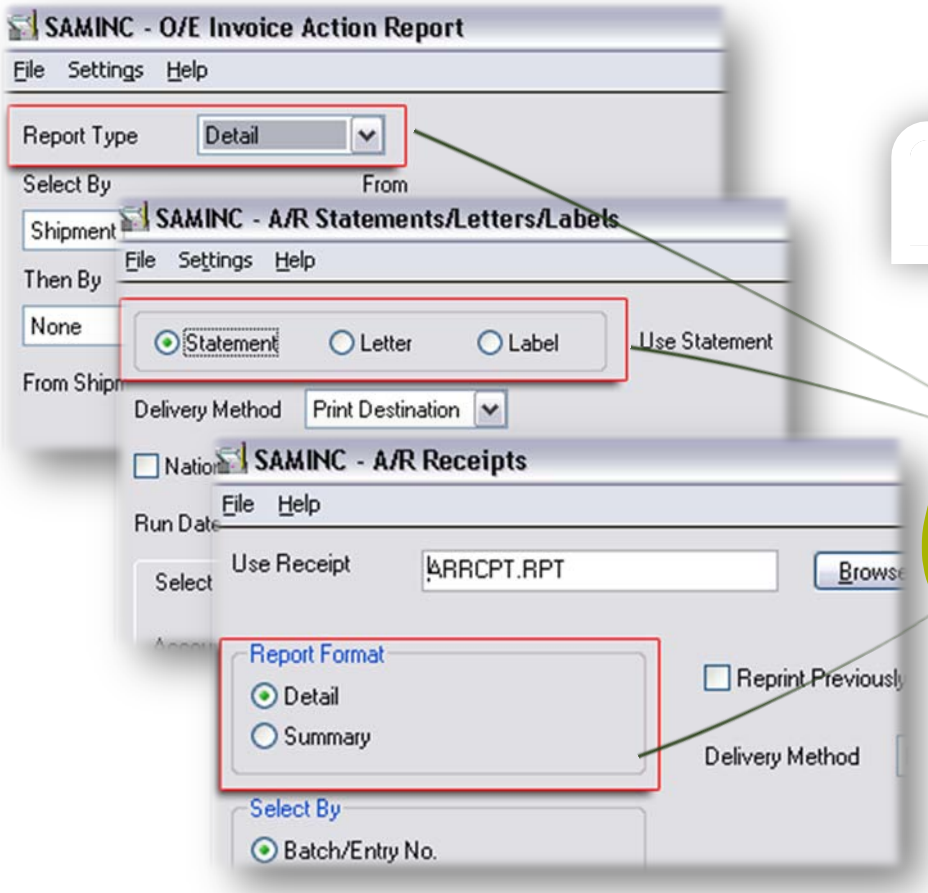
Classic Windows controls

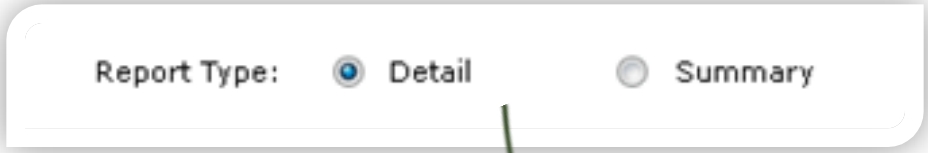
New Web controls

Classic

New User Experience

Version 6.1 - Consistent Experience





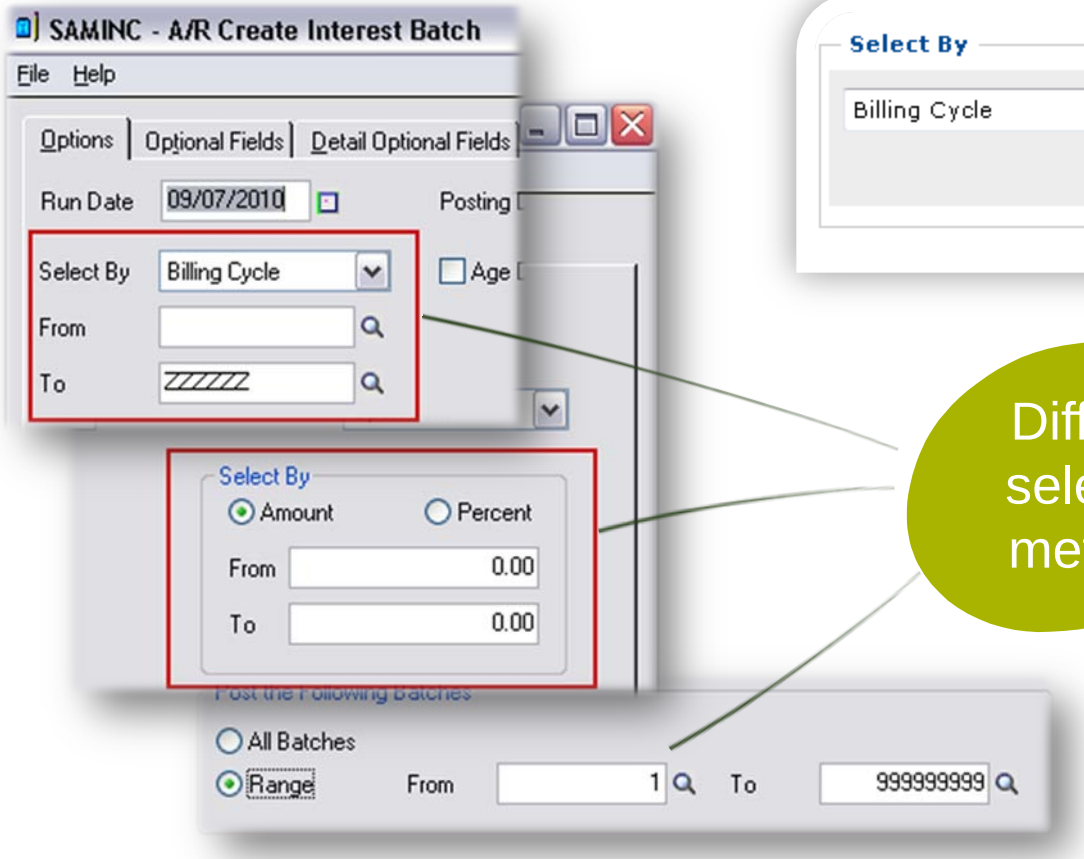
Different selection methods

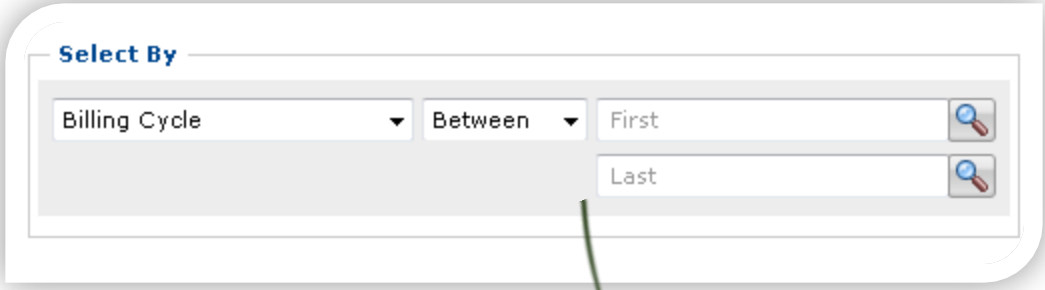
Standardized selections

Classic

New User Experience

Version 6.1 - Consistent Experience





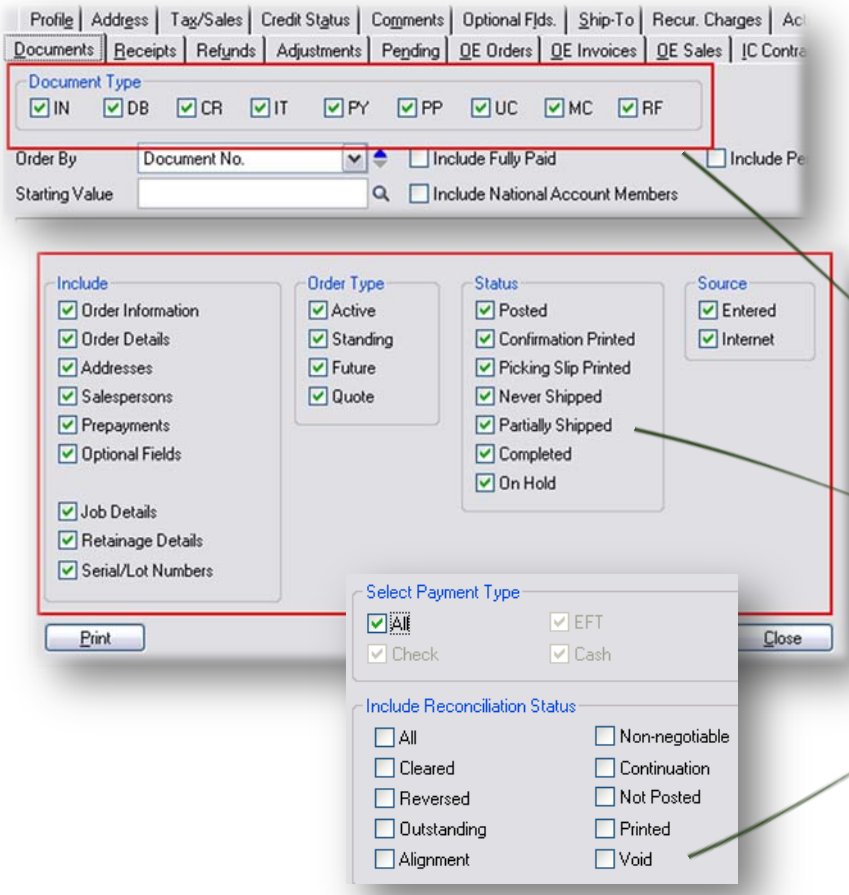
Different selection methods

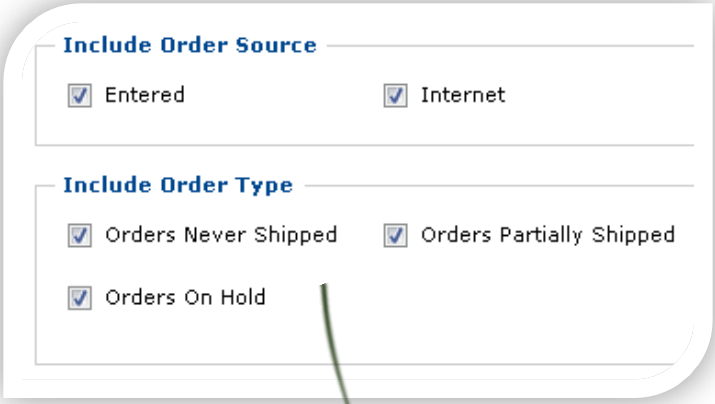
Standardized selections

Classic

New User Experience

Version 6.1 - Consistent Experience





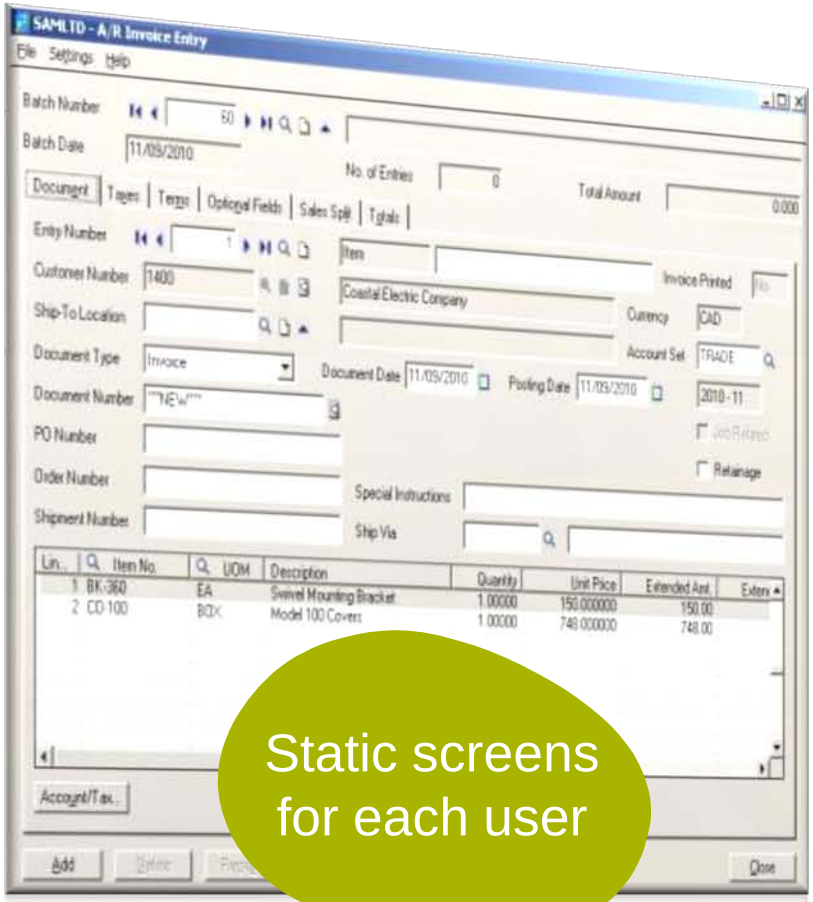
Standardized selections

Different selection methods

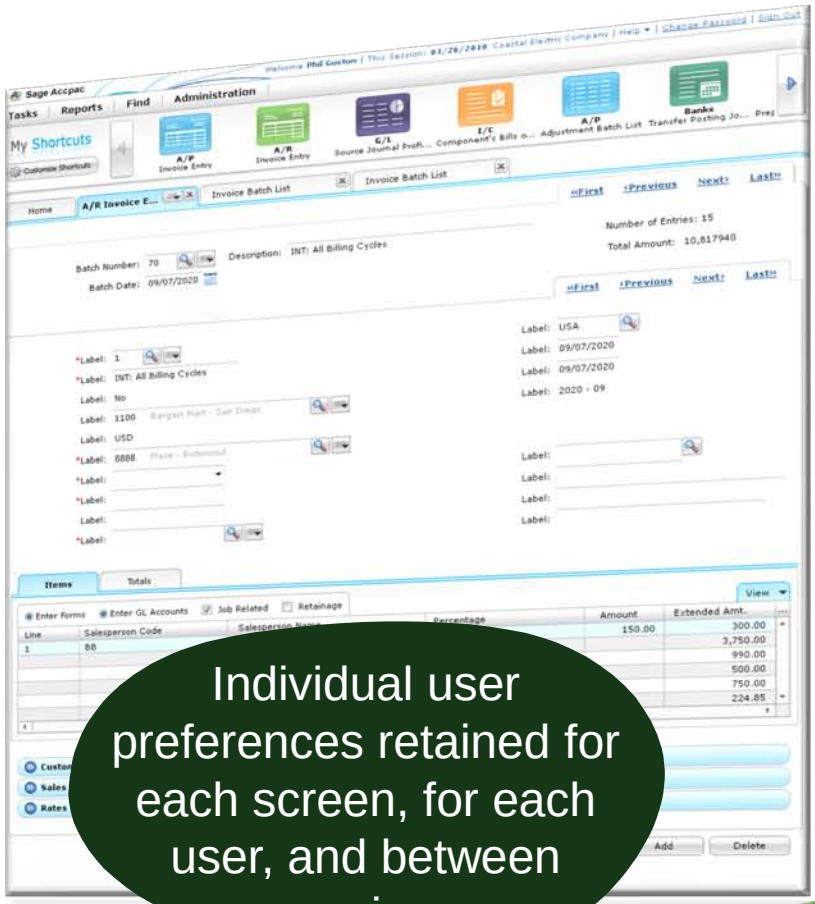
Classic

New User Experience

Version 6.1 – Workflow Enhancements



Static screens for each user

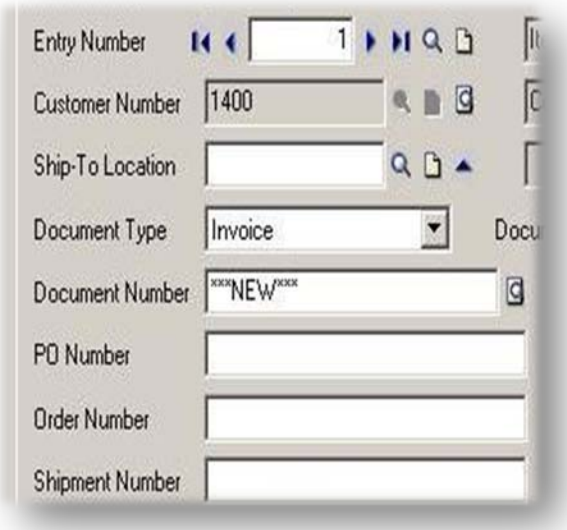


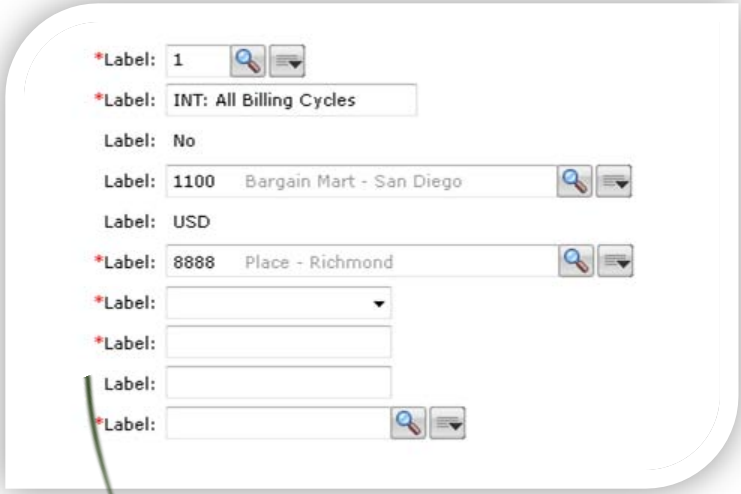
Individual user preferences retained for each screen, for each user, and between sessions

Classic

New User Experience

Version 6.1 – Workflow Enhancements





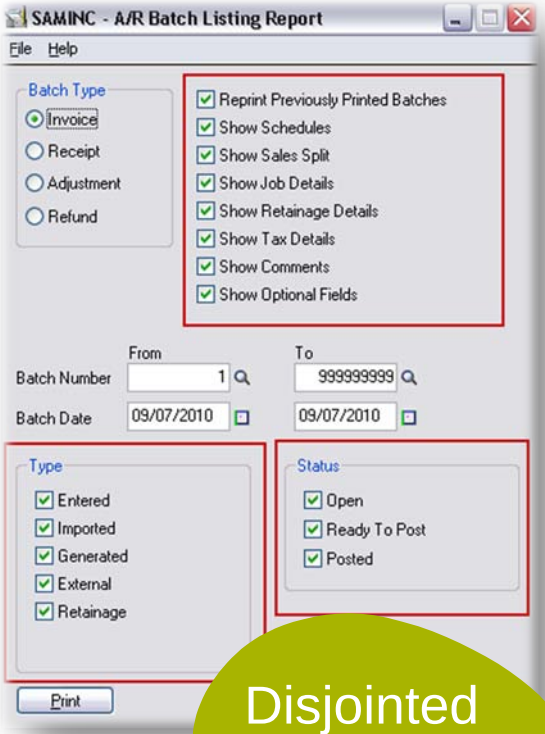
No identification of required fields

Required fields visually identified

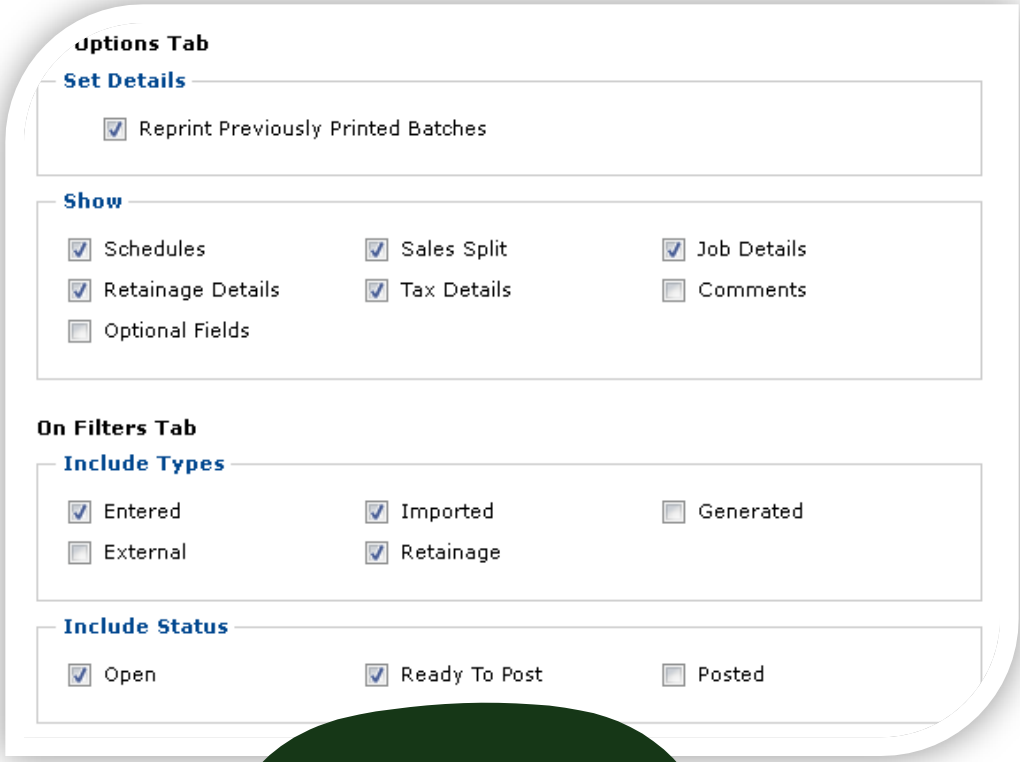
Classic

New User Experience

Version 6.1 – Workflow Enhancements



Disjointed grouping

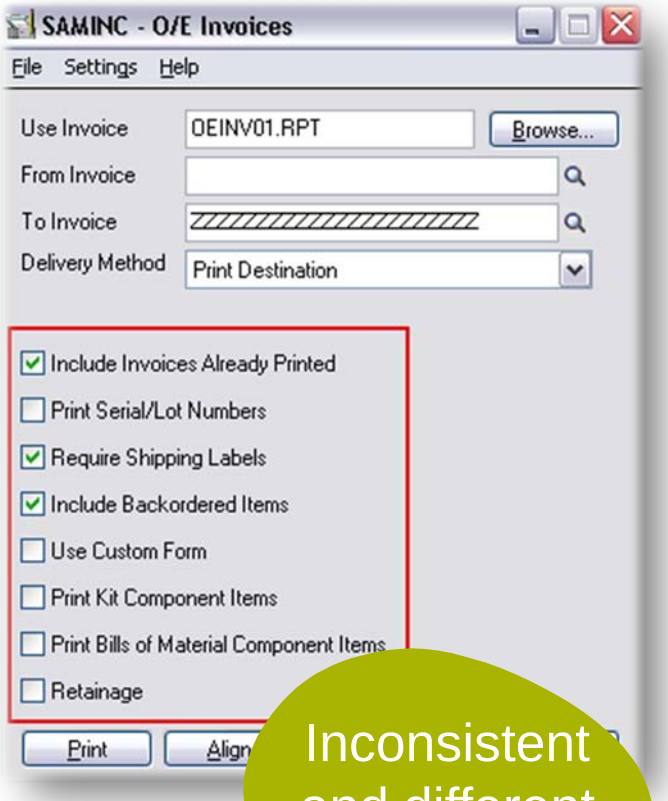


Intuitive grouping and descriptive labels

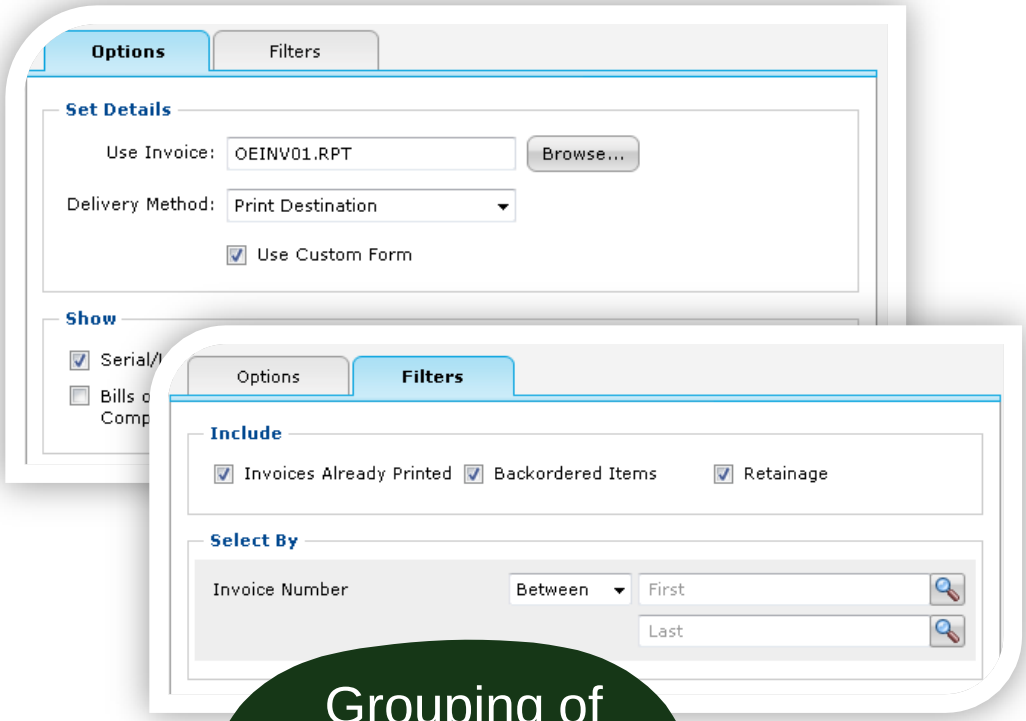
Classic

New User Experience

Version 6.1 – Workflow Enhancements



Inconsistent and different controls

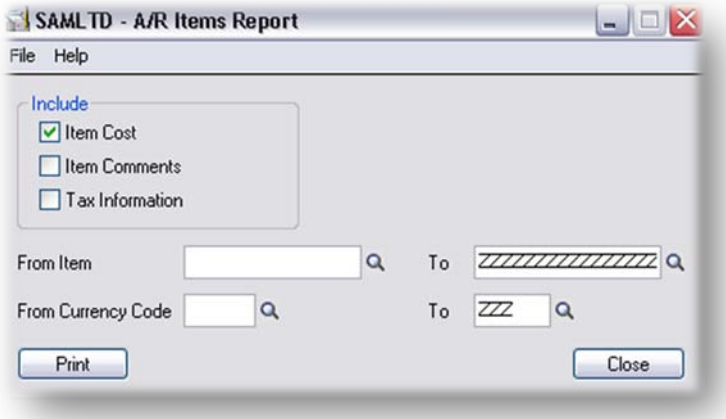


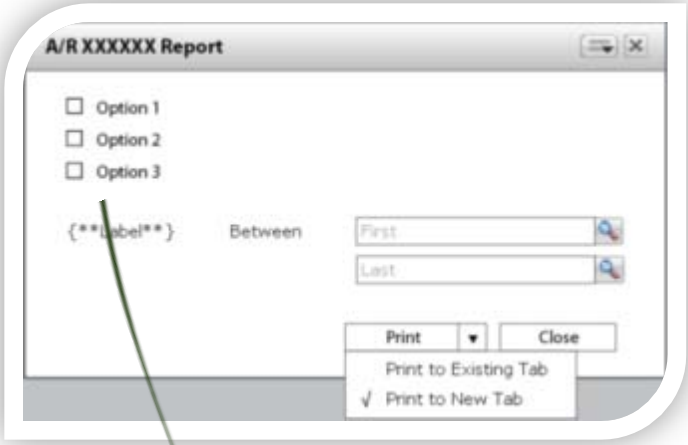
Grouping of similar controls (filters, options)

Classic

New User Experience

Version 6.1 – Workflow Enhancements





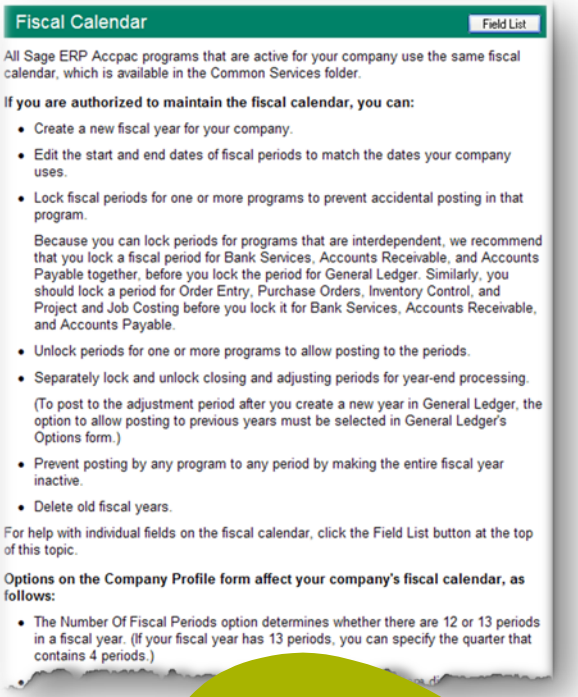
Create a single report with options one at a time

Create multiple versions of a report with different options/ configurations

Classic

New User Experience

Version 6.1 – Learnability Enhancements



Fiscal Calendar

Field List

All Sage ERP Accpac programs that are active for your company use the same fiscal calendar, which is available in the Common Services folder.

If you are authorized to maintain the fiscal calendar, you can:

- Create a new fiscal year for your company.
- Edit the start and end dates of fiscal periods to match the dates your company uses.
- Lock fiscal periods for one or more programs to prevent accidental posting in that program.

  Because you can lock periods for programs that are interdependent, we recommend that you lock a fiscal period for Bank Services, Accounts Receivable, and Accounts Payable together, before you lock the period for General Ledger. Similarly, you should lock a period for Order Entry, Purchase Orders, Inventory Control, and Project and Job Costing before you lock it for Bank Services, Accounts Receivable, and Accounts Payable.
- Unlock periods for one or more programs to allow posting to the periods.
- Separately lock and unlock closing and adjusting periods for year-end processing.

  (To post to the adjustment period after you create a new year in General Ledger, the option to allow posting to previous years must be selected in General Ledger's Options form.)
- Prevent posting by any program to any period by making the entire fiscal year inactive.
- Delete old fiscal years.

For help with individual fields on the fiscal calendar, click the Field List button at the top of this topic.

Options on the Company Profile form affect your company's fiscal calendar, as follows:

- The Number Of Fiscal Periods option determines whether there are 12 or 13 periods in a fiscal year. (If your fiscal year has 13 periods, you can specify the quarter that contains 4 periods.)

Text-only help

Video Tutorials

In these video tutorials, you'll learn how to get started and work more efficiently with new and existing features in Sage ERP Accpac, including shortcuts, snapshots, Sage ERP Accpac Inquiry, fiscal period locking, and SageCRM integration.

To see a current list of all video tutorials, visit the Sage ERP Accpac Video Tutorials website.

Note: The following links open videos in a new browser tab or window, and require an Internet connection.

Getting Started

Sage ERP Accpac 6.0: Overview (4:42)
Learn about the major changes and key new features in Sage ERP Accpac 6.0.

Portal Menus: Overview (2:43)
Use the menu bar in the Sage ERP Accpac Portal to find and open forms and reports.

My Shortcuts: Overview (1:57)
Create and arrange shortcuts so that you can open your favorite forms and reports with a single click.

Snapshots

Snapshots: Overview (3:22)
Add and arrange snapshots on your home page to see key information at a glance.

Configuring Snapshots (6:25)
Set up snapshots so they display the information you need.

Sage ERP Accpac Inquiry

Creating a Query (6:18)
Set up filters in Sage ERP Accpac Inquiry to extract only the information you need from General

New video-based help with interactive "how to" videos

Classic

New User Experience

Version 6.1 – Learnability Enhancements

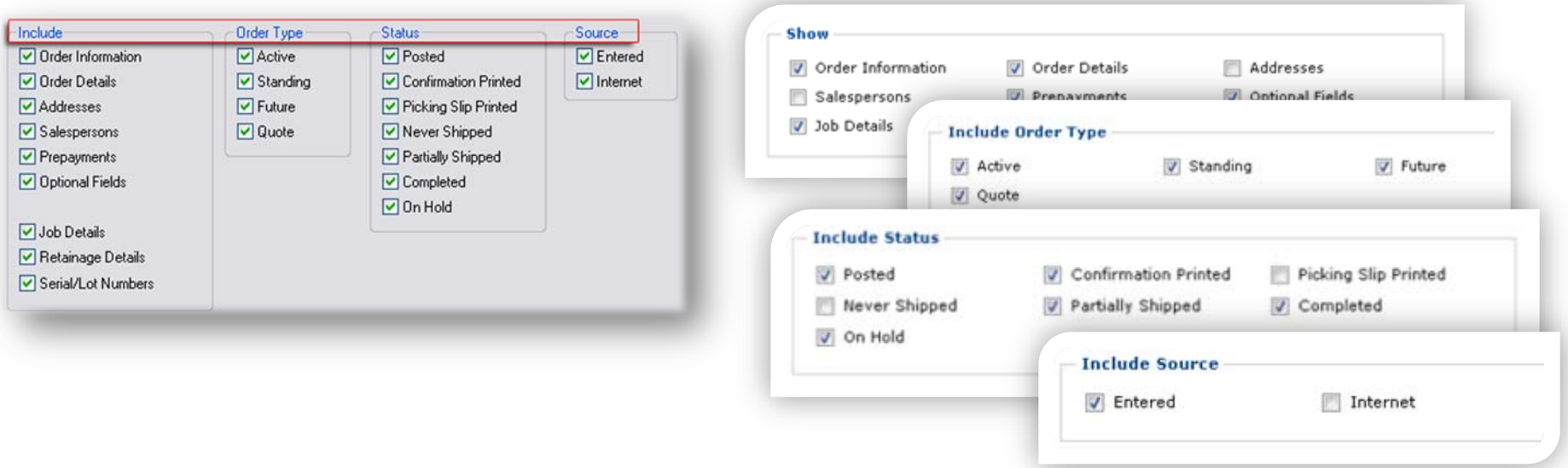
No direct link to field-level help – minimum of 3 clicks away

1-click to contextual, field-level help

Classic

New User Experience

Version 6.1 – Learnability Enhancements



Confusing labels and groupings

Descriptive labels and intuitive grouping

Classic

New User Experience

Version 6.1 – Web Deployment Mobile Access

- Mobile-enabled web architecture built on industry standard technologies
  - Sage Web Toolkit (SWT) built using technology from Google
  - SData provides XML-based RESTful web services interface using HTTP for communications
  - Browser-neutral and zero-client footprint based on HTML5/CSS3/Javascript
    - Native support for iOS and Android devices and newer Blackberries
    - Native support for Windows Phone with embedded IE 9

Internet Explorer

Google Chrome

Apple Safari

Mozilla Firefox

Version 6.1 – Mobility

Sage ERP Accpac 6.1
Web Server
enables mobility through
SData Web Services

Smart phones

Laptops

Desktops

Tablets

Collaborate using any device running an HTML5 browser

Sage ERP Accpac Version 6.1 on iPhone

Version 6.1 – Virtualization and Platforms

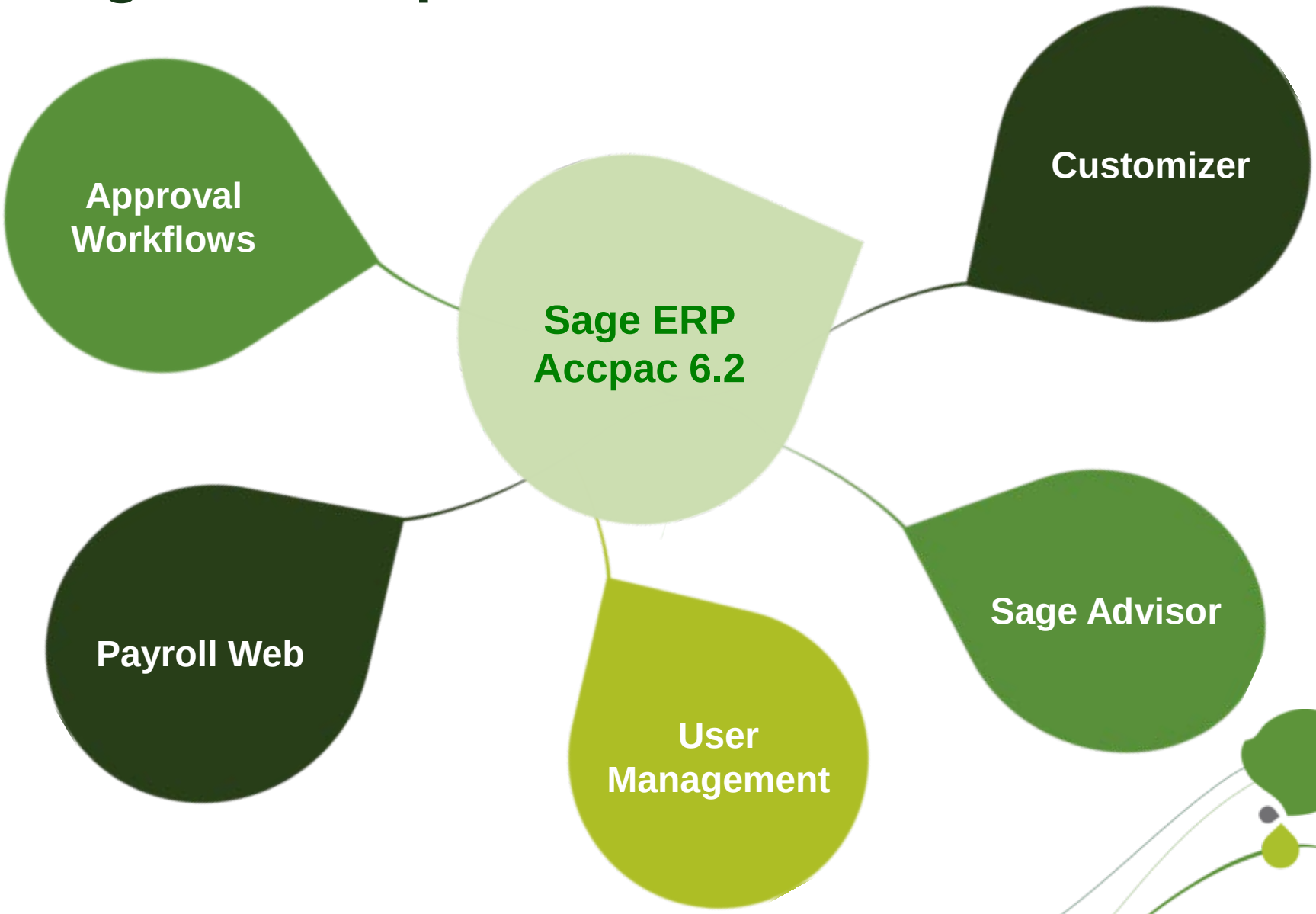
- Virtual platforms supported
  - VMWare ESX
  - Microsoft Hyper-V – ***NEW***
  - Microsoft Windows Terminal Services
  - Citrix Terminal Services
  - Citrix XenApp Server
- Pervasive 11 support - ***NEW***

Learn more about Version 6.1 at
http://smist08.wordpress.com/

More information about SData
http://sdata.sage.com/

Sage Web Toolkit resources for Development Partners
http://dppwiki.accpac.com/wiki

Sage ERP Accpac Version 6.2 - Themes



Additional Resources

Sage ERP Accpac Community
http://community.sageaccpac.com/

Get Your Voice Heard - Enhancement Requests
www.sageaccpac.com/Feedback

Sage Business Care Customer Support Programs
http://www.sageaccpac.com/Support-and-Training/Business-Care-Plans